GRANTS

GRANTS REVIEW AND TRACKING SYSTEM

Public User Guide

June 2014

Department of Water Resources

Project Services Office

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Contents

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I. Introduction

Welcome to the Grants Review and Tracking System (GRANTS) for the California Department of Water Resources. Your organization can ensure efficient contract management and project oversight by using GRANTS. GRANTS is an interface that enables the project team to work together to manage contracts terms, project tasks, expenditures, and deliverables. DWR and Project Partners will track:

- Bond funds, cost-share from other state, federal, local, or other contributions that sum to the total project amount
- Milestones and project tasks
- Expenditures vs. percentage of work complete
- Deliverables
- Checklists of customizable items
- Invoice payment process
- Task level details

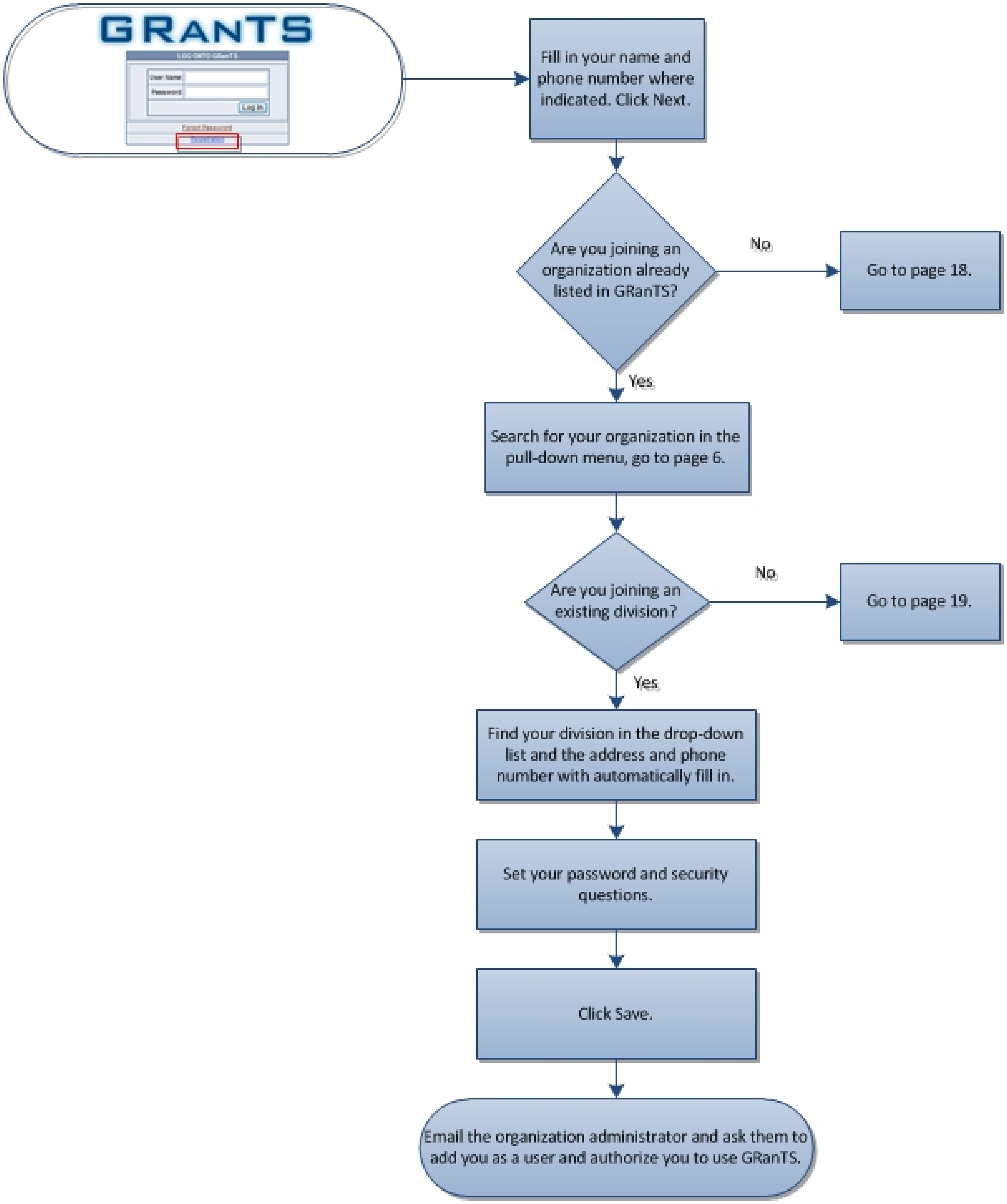
This guide provides screen by screen instructions for using GRANTS. If you need additional assistance using GRANTS, contact us at (888) 907-4267 or GRANTSadmin@water.ca.gov.

To use GRANTS you must create an account through the registration process (Figure 1: Registering in GRANTS).

Once you are registered you can use the system to prepare and submit proposals for an online solicitation, view contracts & projects, manage your organization's interaction with DWR, and prepare and submit invoice summaries and other activities that are related to the administration of Bond Funds through DWR.

Modules within GRANTS can be accessed using the **RED** tabs (the tab turns **BLUE** when you have selected a GRANTS module). The Sub-Modules are displayed as hyperlinks in the blue banner under the Module tabs. Within the Sub-Modules, the information presented may be further divided into Workbooks which are shown as gray tabs in the main display panel.

Figure 1: Registering in GRANTS



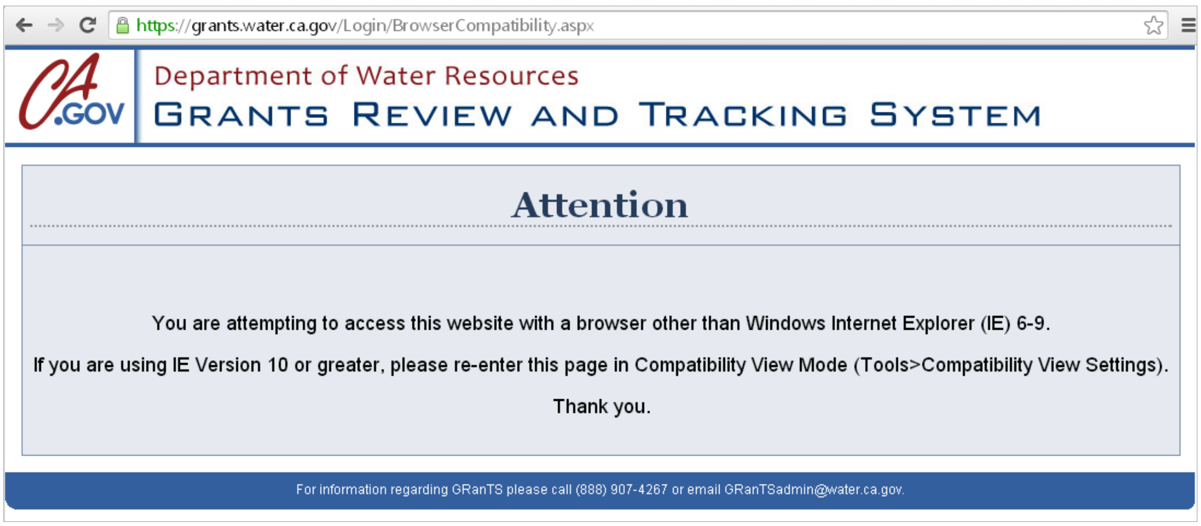
II. Getting Started

The launch page is located at: http://www.water.ca.gov/grants/.

Browser Requirements: Internet Explorer Version 6 or later

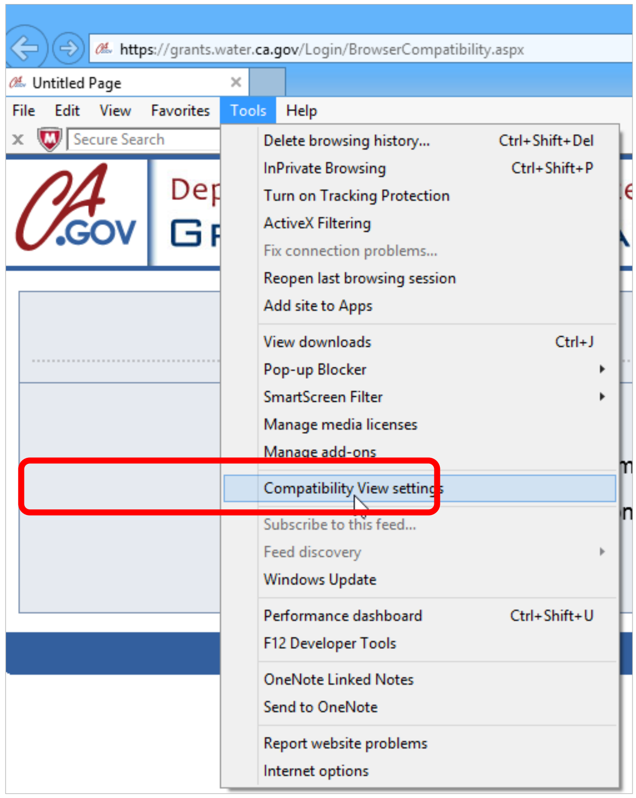
- GRANTS works best with Internet Explorer Version 6-9.

- If you are using Internet Explorer and the version is greater than 9 or other Browsers, you will get the following message:

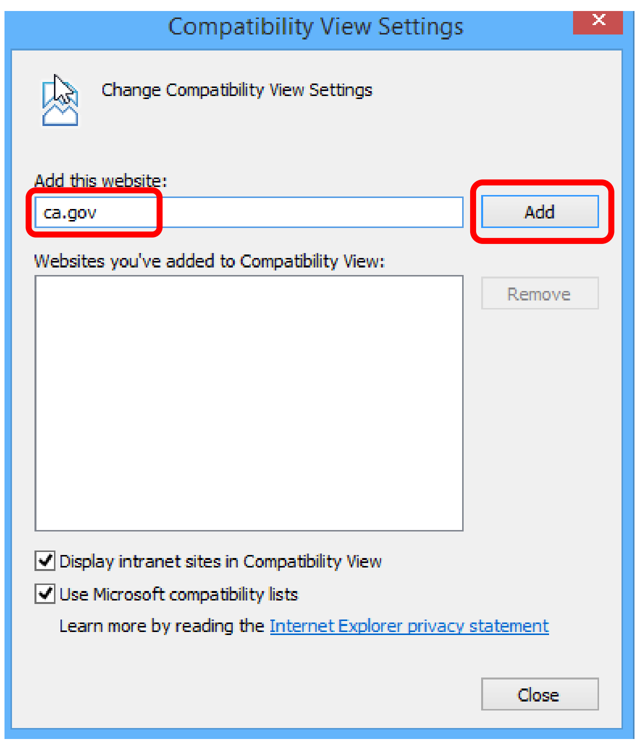


- If you are using Internet Explorer and the version is greater than 9, please turn on Compatibility View as shown on the next page:

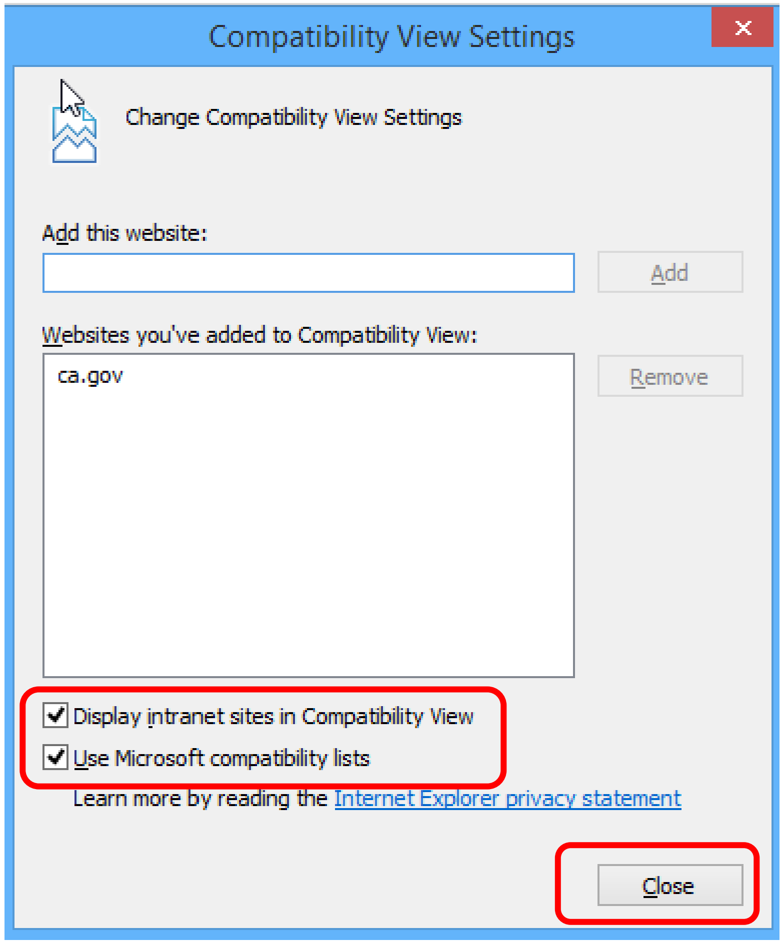
1. click **Tools** and then click **Compatibility View settings**



2. Under Add this website, enter **"ca.gov"** , and then click on Add button



3. Make sure all the check boxes are checked



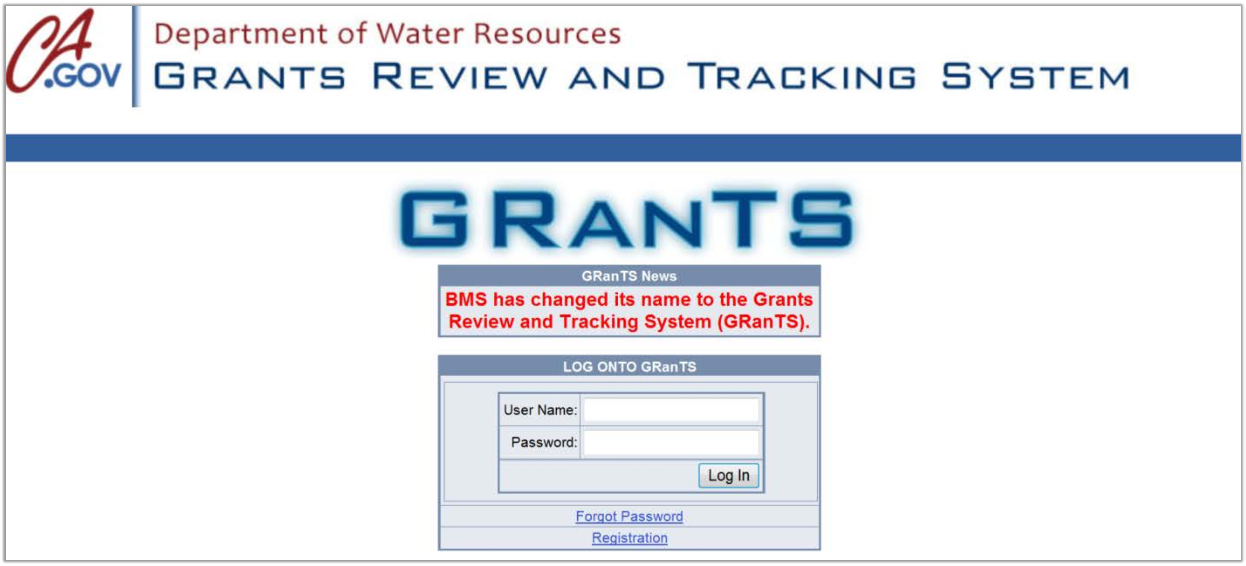
4. Click on **Close** button.

The following graphic shows the GRanTS Home page:

The GRanTS Home Page has information we encourage you to read before you begin using GRanTS. Please review this guide, the Quick Start Guide, Frequently Asked Questions, and other training tools located at this site.

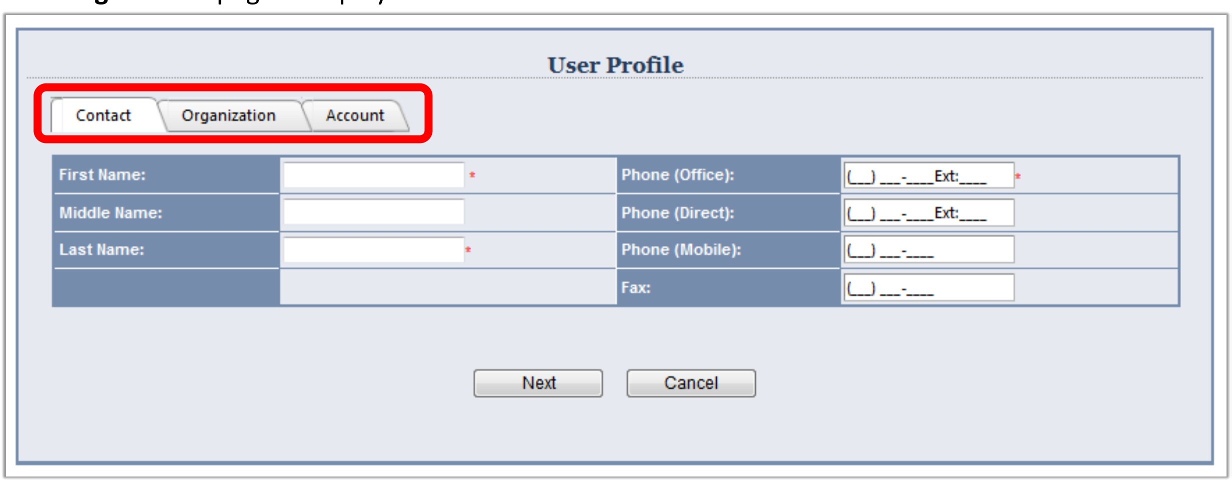
To begin, click on the **GRanTS Sign In** button on the bottom of the launch page.

The login screen is displayed so the user can enter his/her **User Name** and **Password** and click on the **Log In** button to log in:



Click on the **Registration** hyperlink located under the **Log In** button to enter in your information so that you can start using the GRANTS system.

The **User Registration** page is displayed:

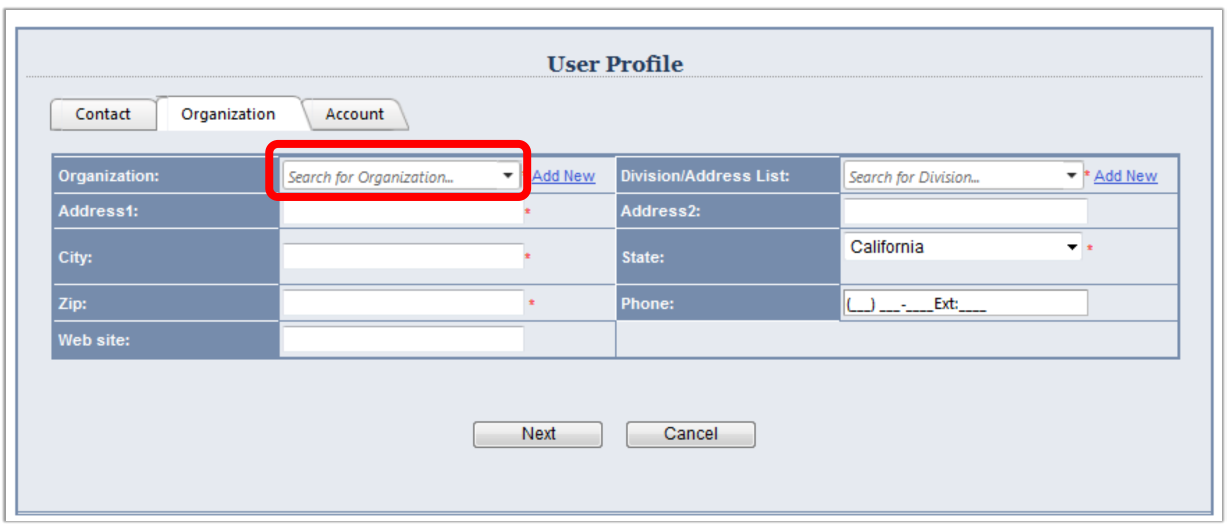


On the **User Registration** page, the following three tabs are visible:

- Contact
- Organization
- Account

In the **Contact** Tab, fill out your **First** and **Last Name**, and **Phone (Office)** information, and then click on the **Next** button.

NOTE: The fields marked with a red asterisk (*) are mandatory and must be completed.

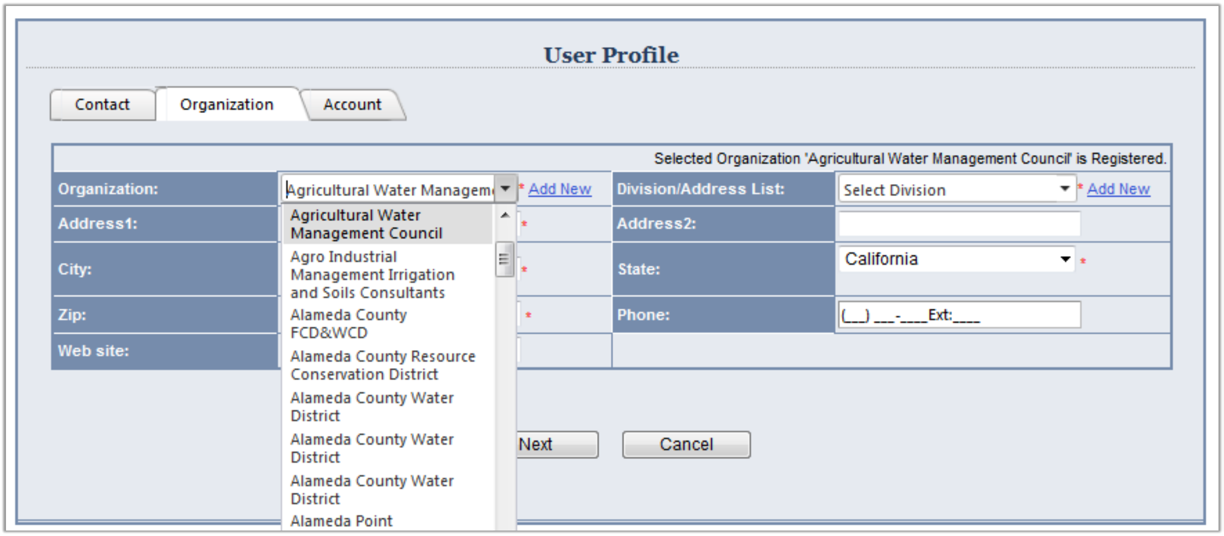


The **Organization** tab will be displayed. For detailed information about searching, adding, or joining an organization, please refer to the **Organization Section** of this guide. You can either start typing the name of your organization in this field to narrow the list to show matching organization names, or you can select an existing **Organization** name from the dropdown field.

Select a Division from the **Division/Address List** dropdown field.

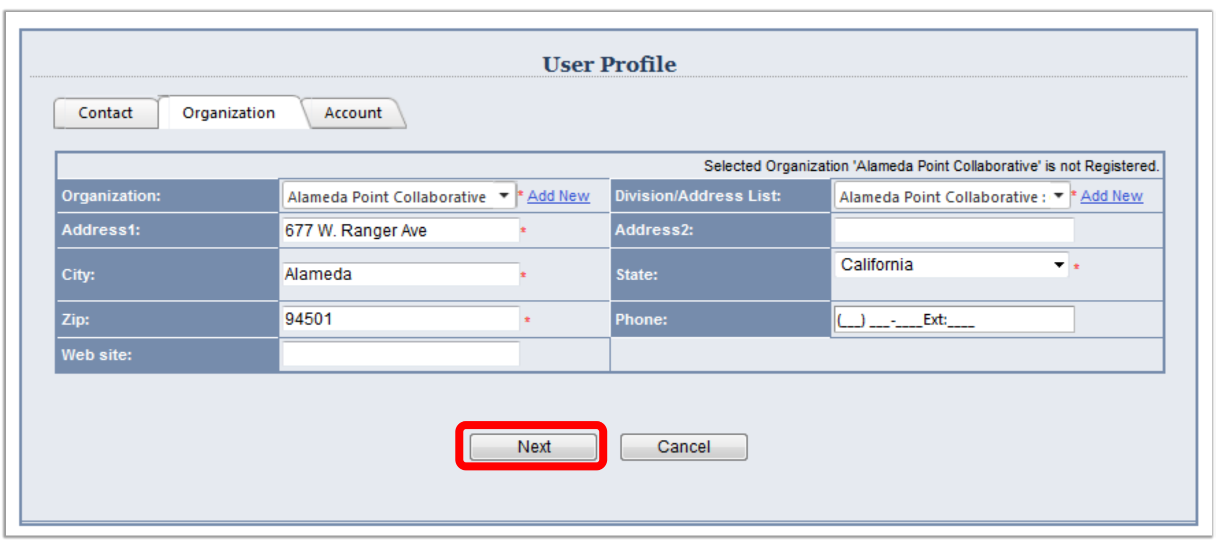
If your **Organization** or **Division** is not found, click on the **Add New** hyperlink located next to the **Organization** or **Division** dropdown menu. Please do not type the Division information directly on this screen. For additional details pertaining to adding a new **Organization** or **Division**, follow the following links: Click here to add a new Organization and click here to add a new Division.

Values for the **Address**, **City**, **State**, **Zip**, **Phone**, and **Web site** fields for the selected Organization and Division will be auto-populated by the system once a Division has been selected from the dropdown menu.



If you share a Tax Identification Number (TIN) with a higher level organization (i.e., *Plumas County Water and Power Agency* and *Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.

Click on the **Next** button to go to the **Account** tab.

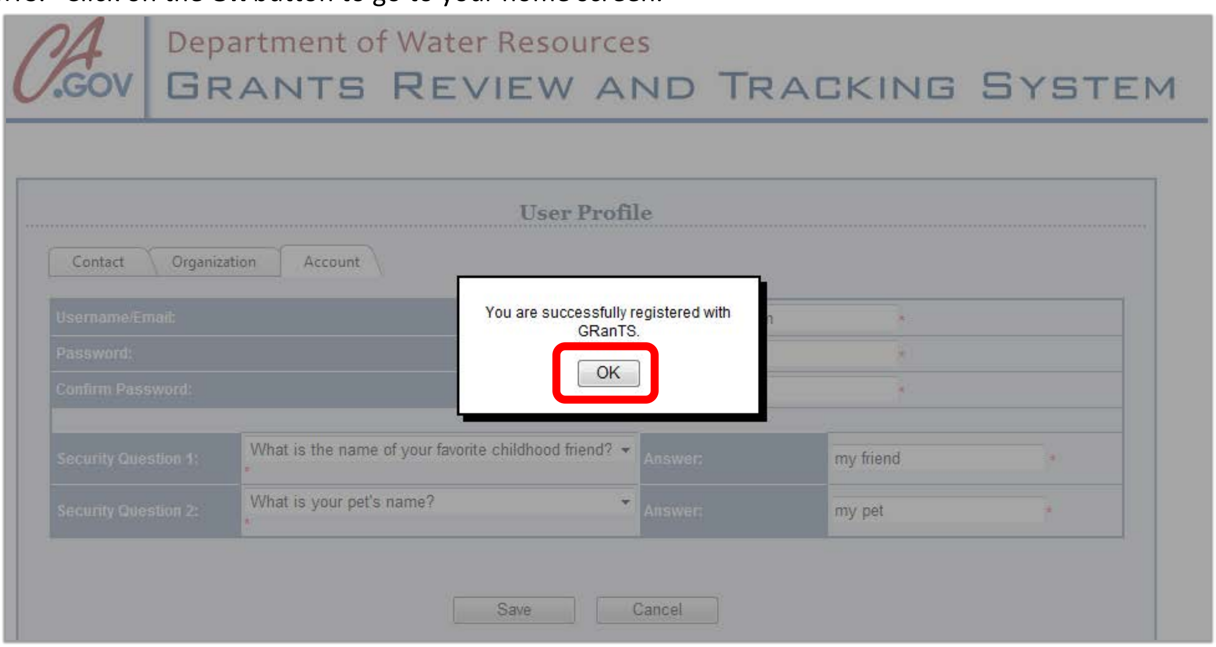


In the **Account** section, do the following:

- Specify a **Username** (your email address: JDoe@gmail.com)
- Specify a **Password** (must be at least 7 characters long and must contain at least three of the four groups: lowercase alpha, uppercase alpha, numeric, and special characters)
- Confirm the **Password**
- Select a Security Question from the **Security Question 1** dropdown selection
- Provide an **Answer** to the selected Security Question 1
- Select a Security Question from the **Security Question 2** dropdown selection
- Provide an **Answer** to the selected Security Question 2

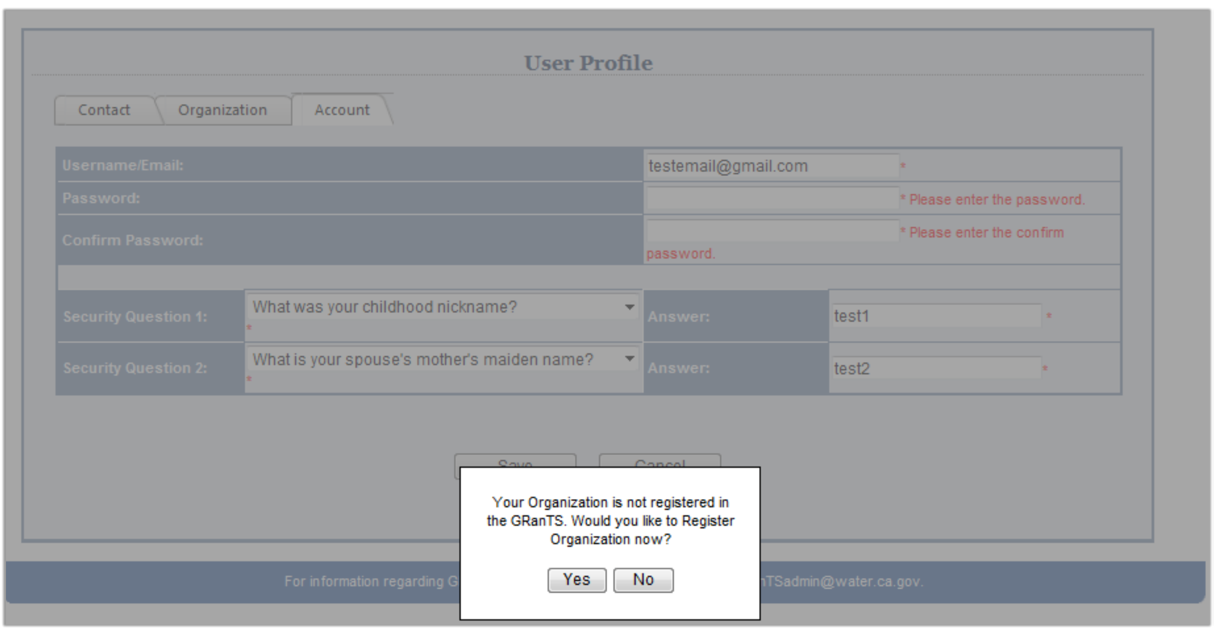
Click on the **Save** button to complete your registration.

The **User Registration Confirmation** popup window will show that: "You are successfully registered with GRanTS." Click on the **OK** button to go to your home screen.



If the system reports that **Selected Email is already registered with GRANTS** when you click on the **Save** button, then you already have an account in GRANTS but it is inactive. Call (888) 907- 4267 or email GRANTSadmin@water.ca.gov if this occurs.

If the Organization selected (on the Organization tab) during User Registration is a new (unregistered) Organization, then the following additional message is displayed at the end of the User Registration process: **Your Organization is not registered in the GRANTS. Would you like to Register Organization now?**

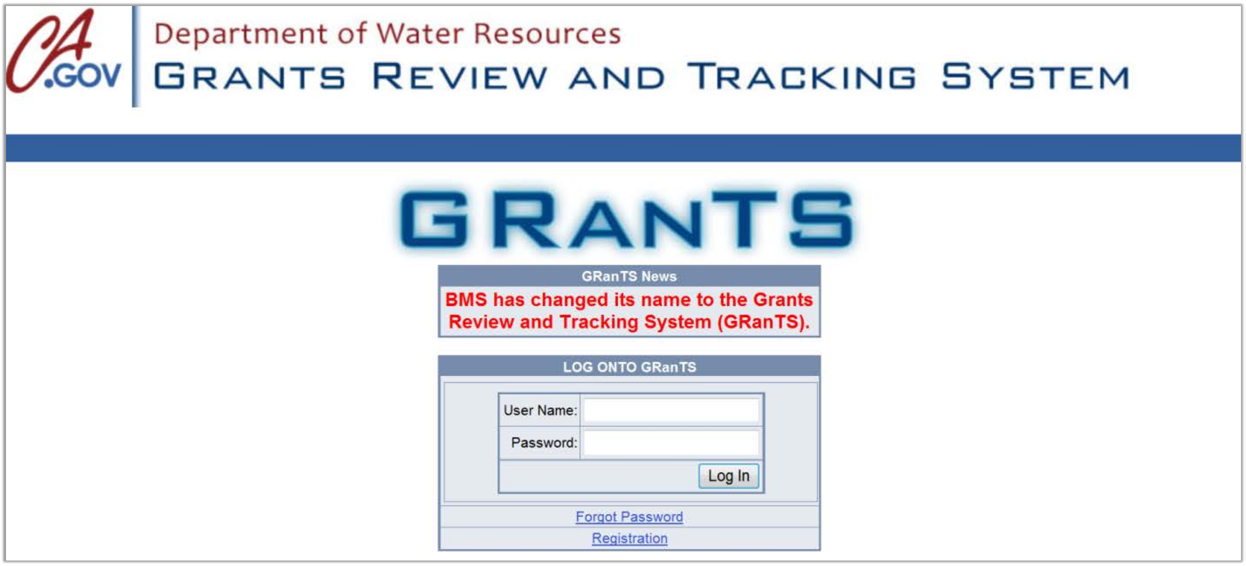


To register your organization, please follow the instructions in the Organization Registration section of this guide.

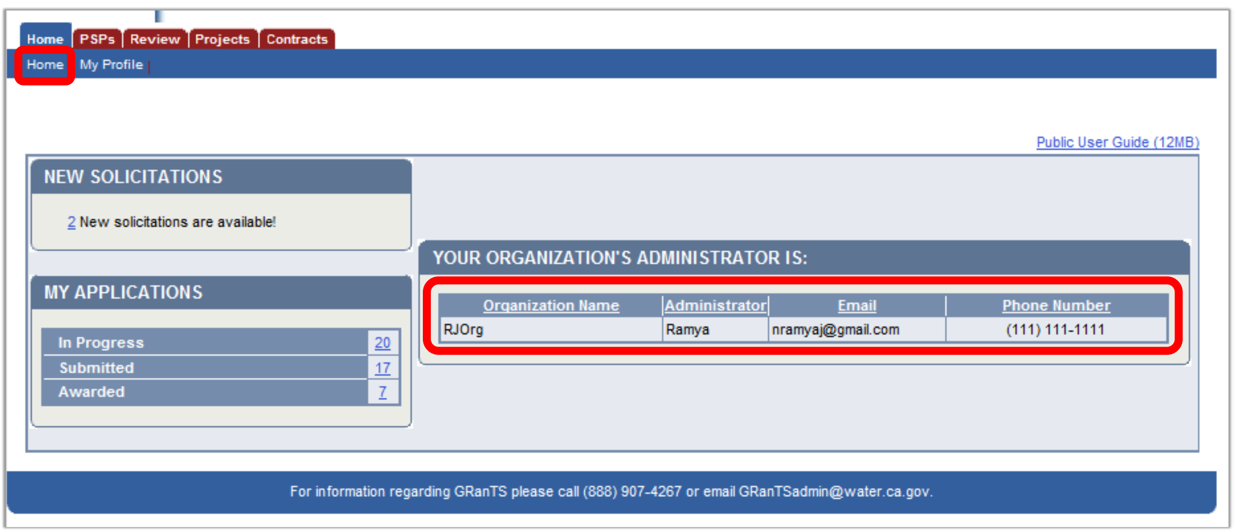
Only the Organization Administrator can register an Organization in GRANTS. Login to GRANTS and the Organization Administrator will be shown on your home page. Contact the Organization Administrator and ask the person to register the Organization. If no Organization Administrator is shown on your home page, contact GRANTSadmin@water.ca.gov to register the organization.

III. GRANTS Home Screen

Enter your e-mail and password established in the steps above.



You will be allowed into the system and your **Home Page** will be displayed:



The GRANTS **Home** tab displays proposals solicitations (PSP/RFP) that are available to apply for through GRANTS, the name and contact information for all Organization Administrators for organizations of which you are a member, and the statuses of your applications.

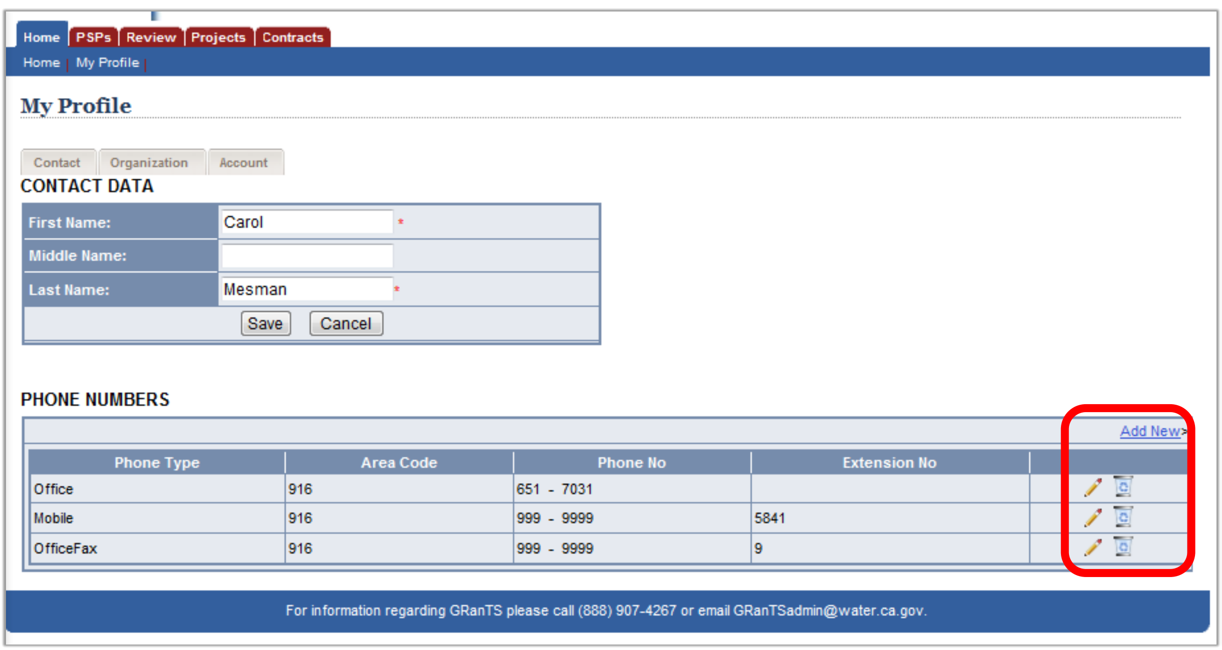
STOP

To view projects, contracts, and proposals that belong to an organization, send an email or call the organization's administrator to ask for access. The Organization Administrator's contact information is listed on the right side of your home page as circled above.

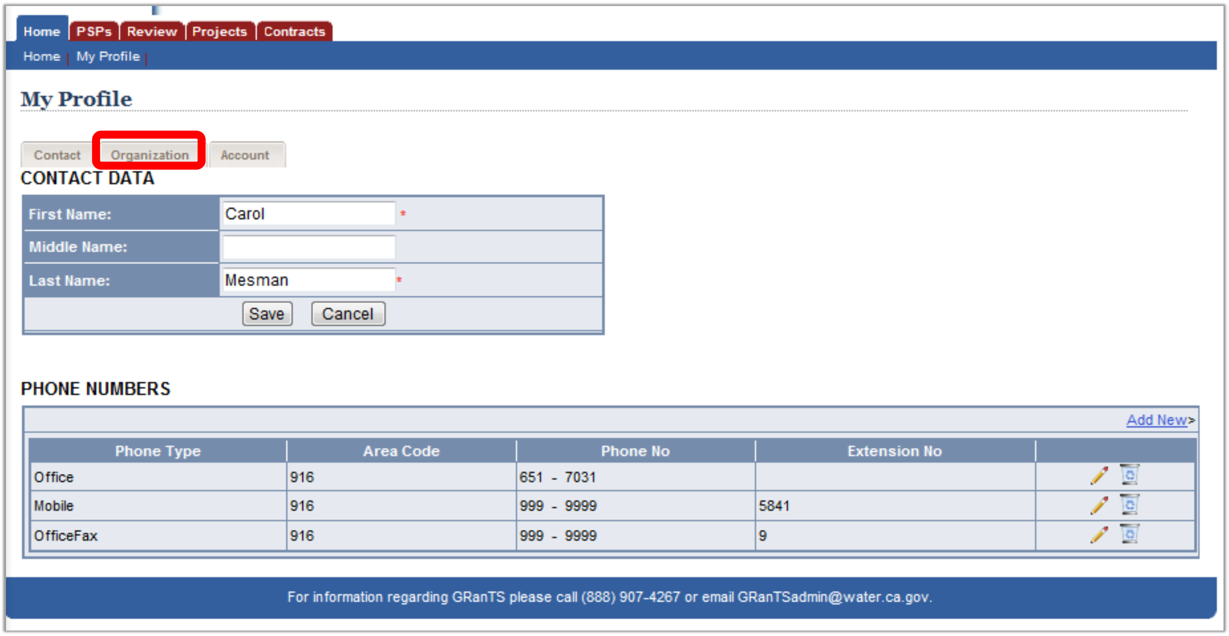
IV. My Profile

To edit your personal profile, click the **My Profile** link in the blue selection bar.

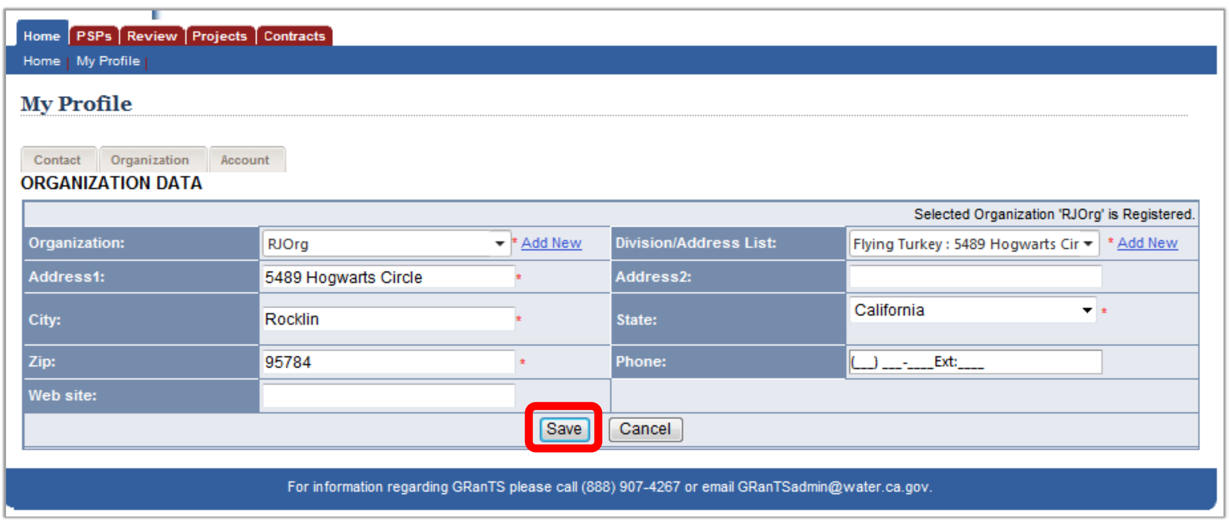
The system shows the **My Profile** screen. To edit or delete a phone number, click on the **Pencil** or **Trash** icon on the far right side of the screen. To add an additional phone number, click on the **Add New** hyperlink.



To become a member of another organization, navigate to the **Organization** workbook tab.



From here, select the name of the organization you would like to join from the dropdown menu, select a division, and click on the **Save** button.



This will update your organization and division. . If you cannot find the organization or division, see the Add New Organization or Add New Division sections of this guide.

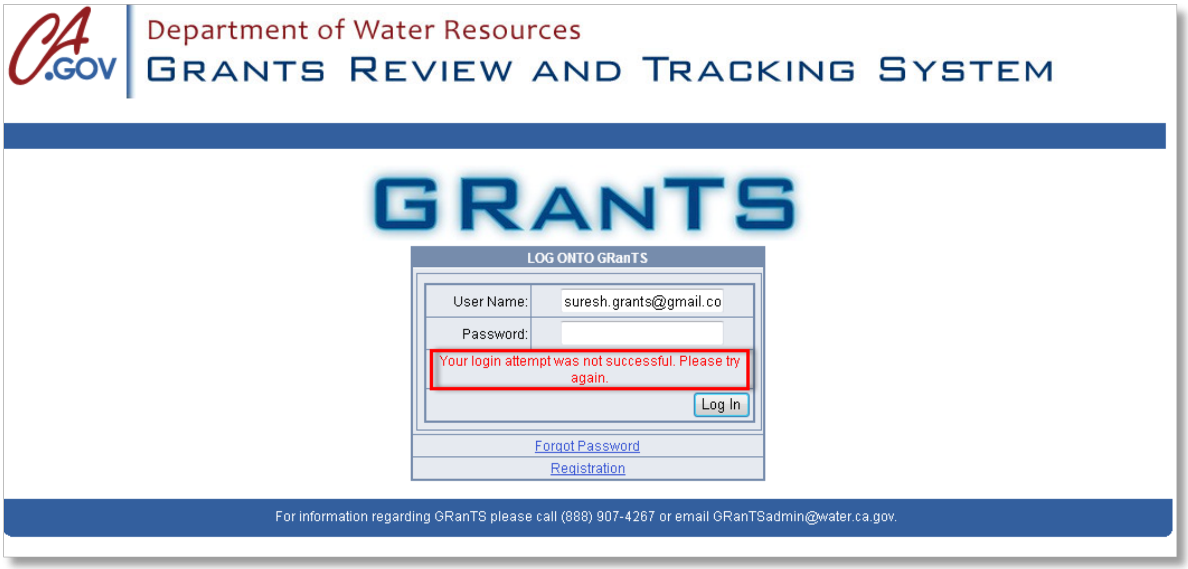
If you want to add a second organization to your profile without removing yourself from the organization you were initially a member of, please contact the Organization Administrator or GRanTS Admin at (888) 907-4267 or GRanTSadmin@water.ca.gov.

To edit your account information, including your password, select the **Account** workbook tab.

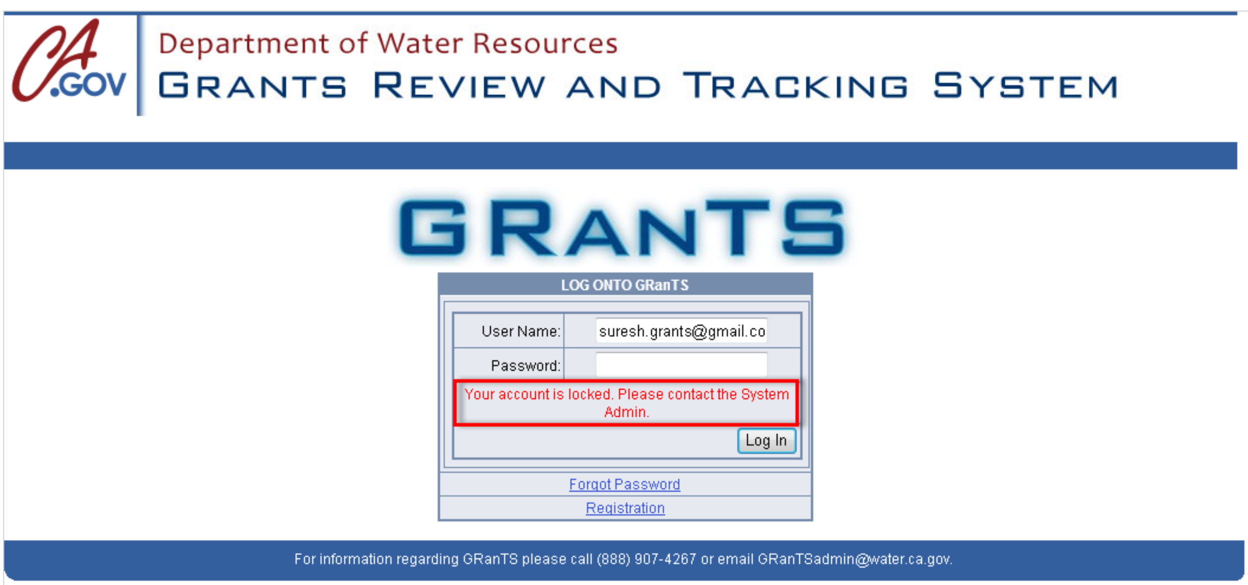
Click on the **Save** button when you have finished making changes.

V. Forgotten Password

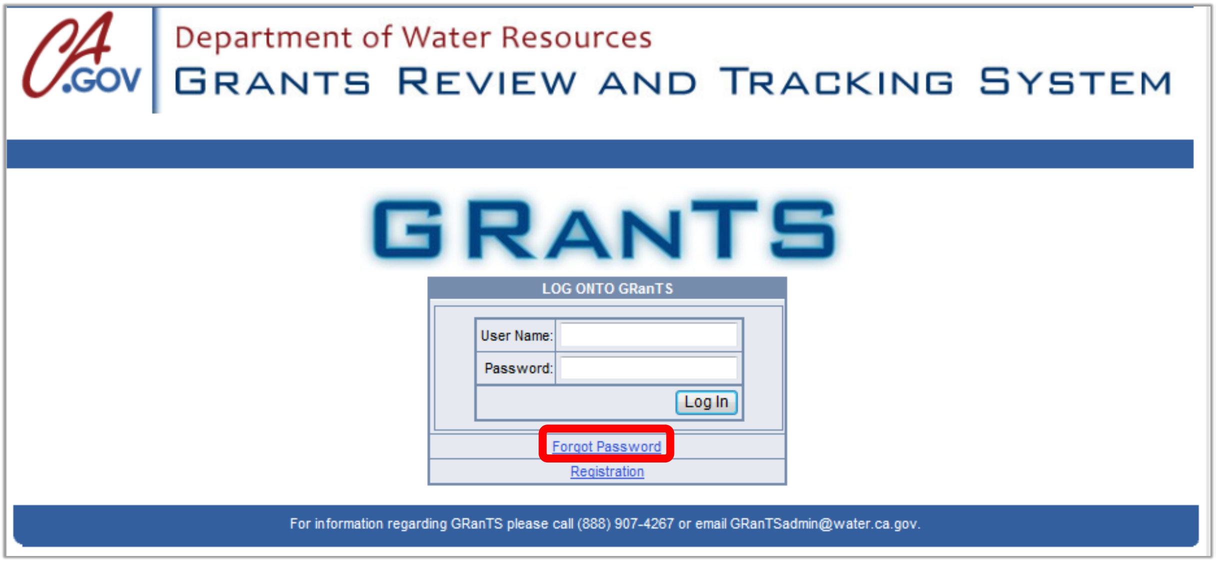
You have only 5 attempts to enter your password. If you enter a wrong password, "Your login attempt was not successful. Please try again" message will appear as shown below.



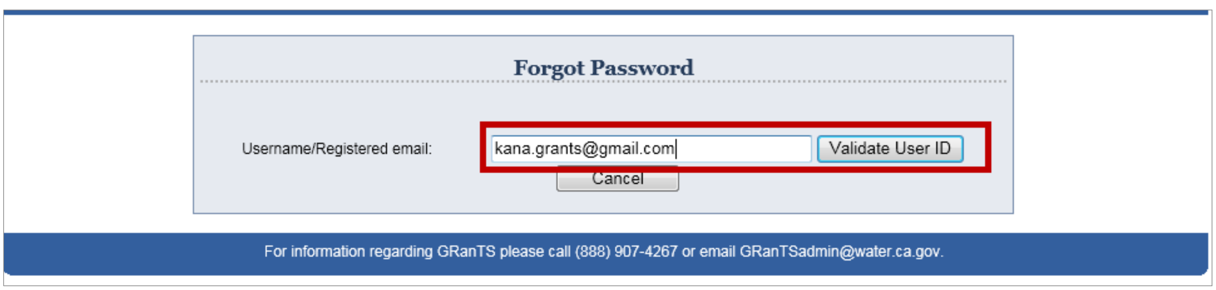
If you are unable to correctly enter the password in five attempts, you will be locked out of the account for security purposes. Contact the Organization Administrator, or the GRanTS Admin at (888) 907-4267 or GRanTSadmin@water.ca.gov to unlock and reactivate your account.



To reset a forgotten password, click on the **Forgot Password** link on the GRANTS **Login** page.



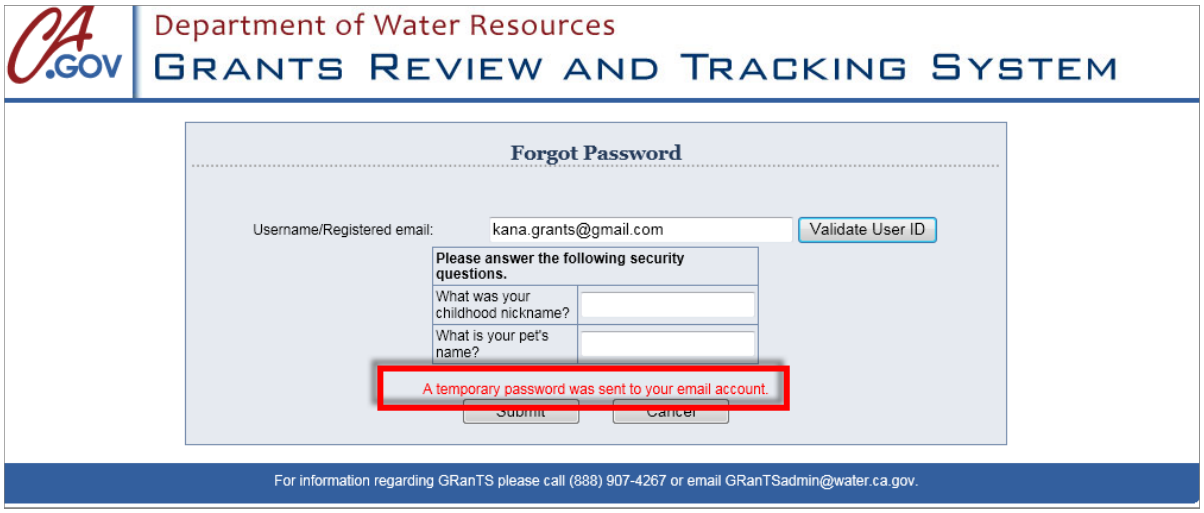
The **Forgot Password** page will be displayed. On the **Forgot Password** page, enter the Username/Registered email address of the Public User whose account password is to be reset. Click on the **Validate User ID** button.



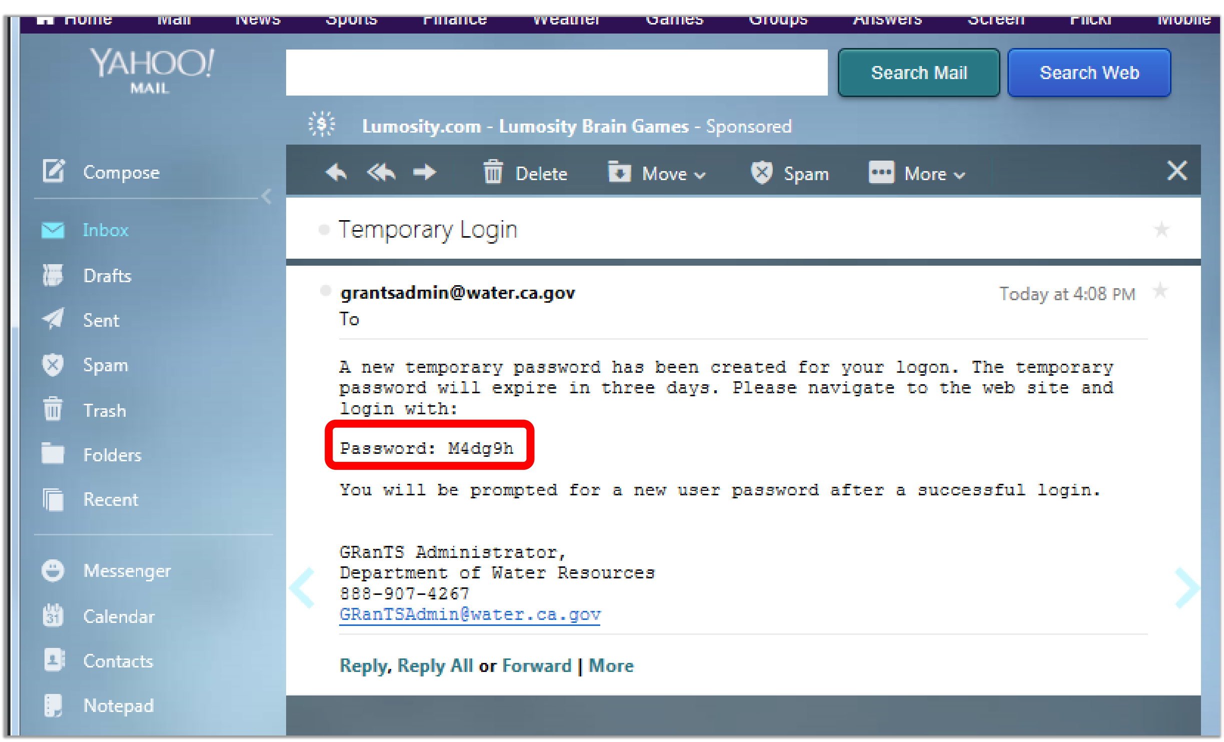
The two security questions defined during the User Registration process and associated with the user account are displayed.

NOTE: You have only 3 attempts to reset your password. If you are unable to correctly answer the security questions in three attempts, you will be prevented from further attempts for security purposes. Contact the Organization Administrator, or the GRANTS Admin at (888) 907-4267 or GRANTSadmin@water.ca.gov to reset your password.

After providing the correct answers to both Security Questions, click on the **Submit** button. The following confirmation message is displayed on the **Forgot Password** page: **A temporary password was sent to your email account.**

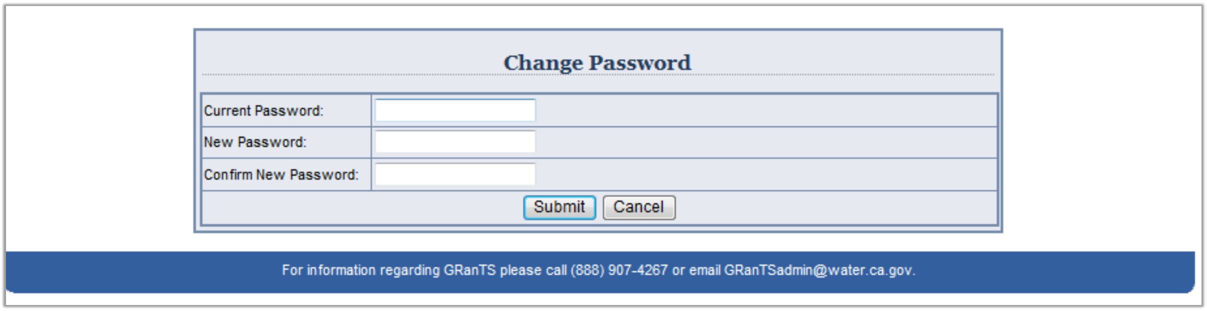


An email containing the temporary Password and instructions on how to reset the account Password is sent to the Public User's email address.

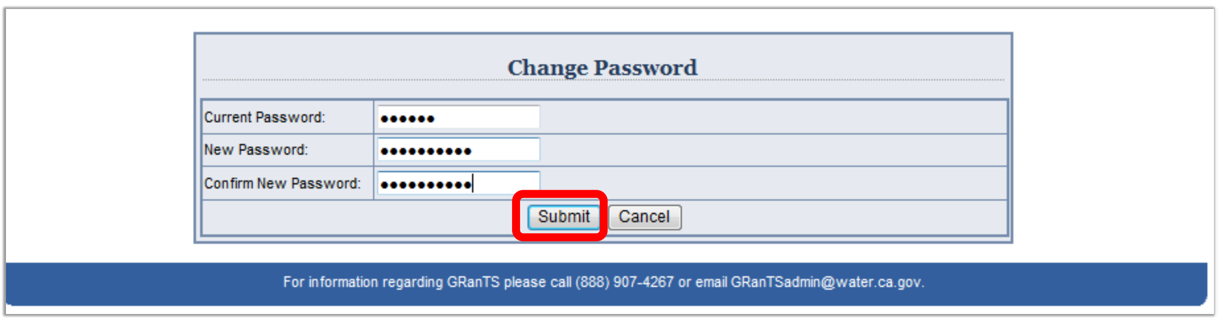


Log in again using the valid **Username** and the new (temporary) **Password** that was sent to the users email account.

The **Change Password** page will be displayed after validating the Username and (temporary) Password.



Use the **Change Password** page to reset the account password.

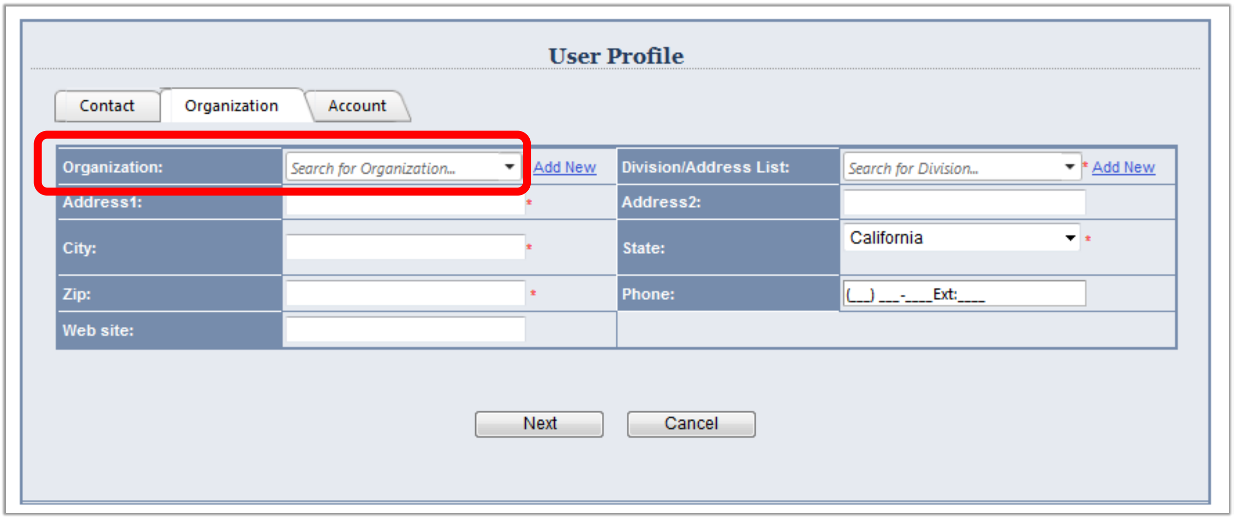


After entering the needed information in the proper fields, click on the **Submit** button.

IV. Organizations

If you share a Tax Identification Number (TIN) with a higher level organization (ie., *Plumas County Water and Power Agency* and *Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.

A. Searching for an Organization



It is important to search and find your organization if it has already been entered into GRANTS. There are several reasons your organization might already be entered and they include the following:

- Your organization had a contract with DWR previously
- Someone else from a different division or location entered the organization
- The naming convention differs from another entry, i.e.
  - City of Sacramento
  - Sacramento, City of
  - Sacramento Dept. of Parks and Rec.

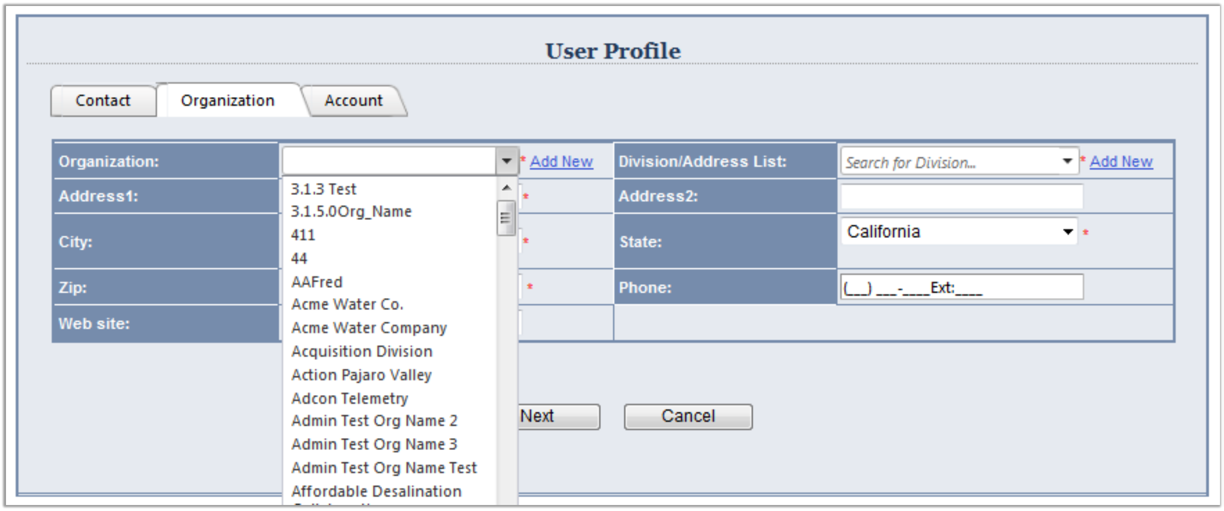
Please search thoroughly for your organization before clicking on the **Add New** hyperlink. Your organization is the primary entity that will contract with DWR. Each sub-department or division should select the higher organization from the drop-down menu and either select their division or **Add** a **New Division** to that organization.

To search for an organization, the basic steps are:

1. Select an existing Organization name from the **Organization** dropdown field. You can start typing the name of your organization in this field to narrow the list to show matching organization names.

2. Select a Division from the **Division/Address List** dropdown field.

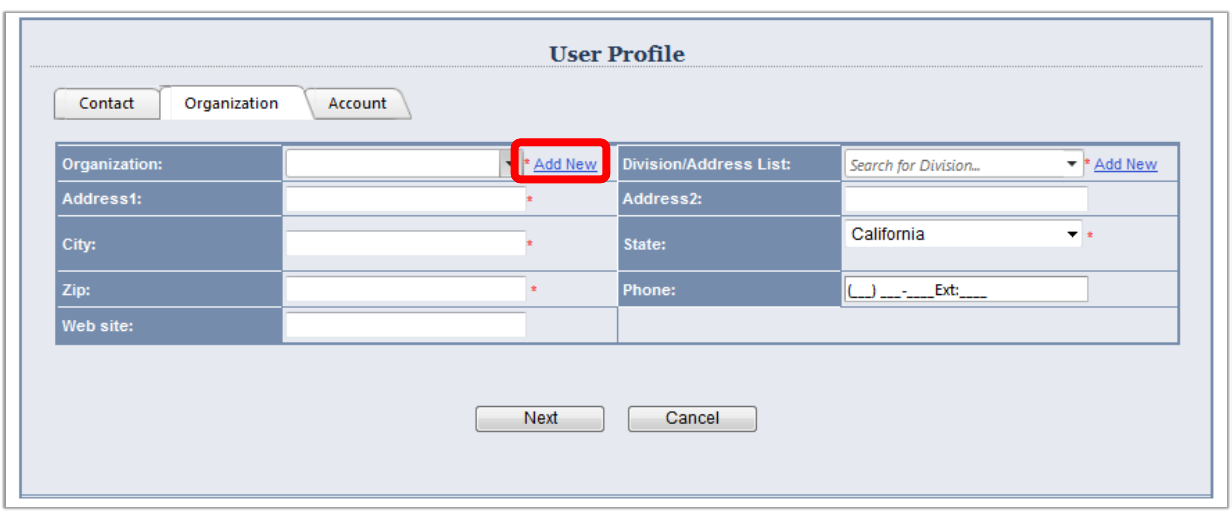
3. Values for the **Address**, **City**, **State**, **Zip**, **Phone**, and **Website** fields for the selected Organization and Division will be auto-populated by the system once a Division has been selected from the dropdown menu.



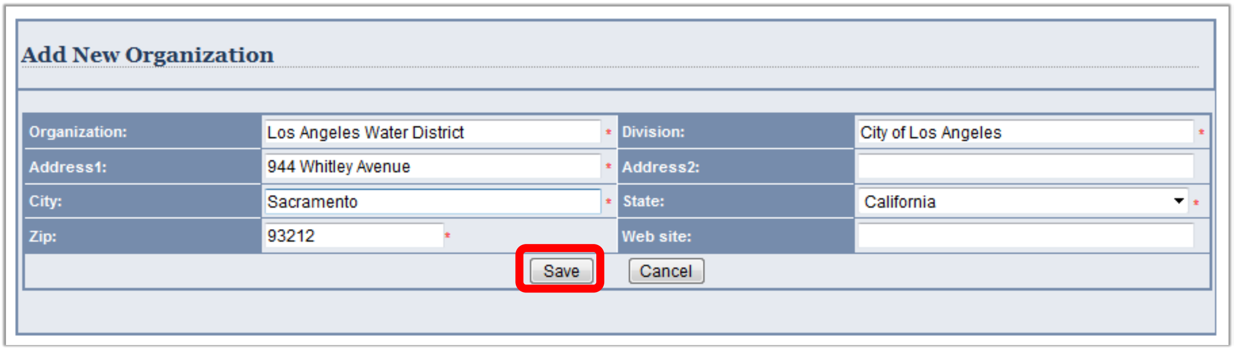
B. Creating a New Organization

To enter a new organization name (one that does not exist in GRANTS) follow these steps:

If you share a Tax Identification Number (TIN) with a higher level organization (i.e., *Plumas County Water and Power Agency and Plumas, County of*) be sure to register the higher level organization (*Plumas, County of*) and create the lower level organization (*Plumas County Water and Power Agency*) as a division of that organization. Failure to do so can result in multiple divisions of a county or city trying to use the same TIN. The TIN must be unique to an organization.



Click the **Add New** hyperlink next to the **Organization** dropdown menu.

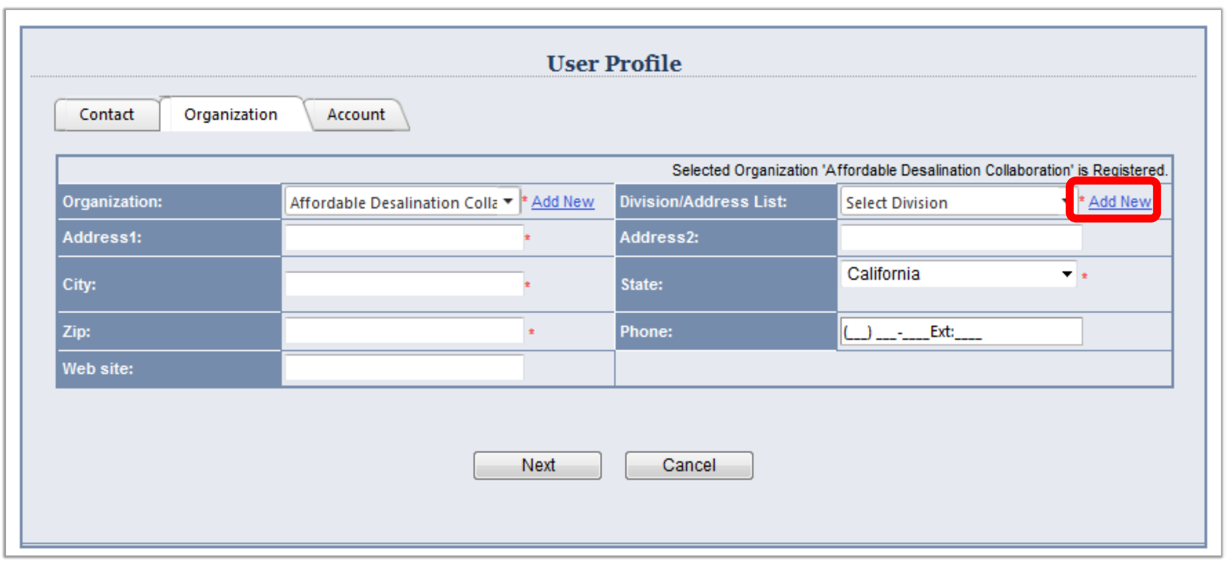


Enter the address and contact information. Click on the **Save** button to save the information you entered. You will then be returned to the **Organization** screen.

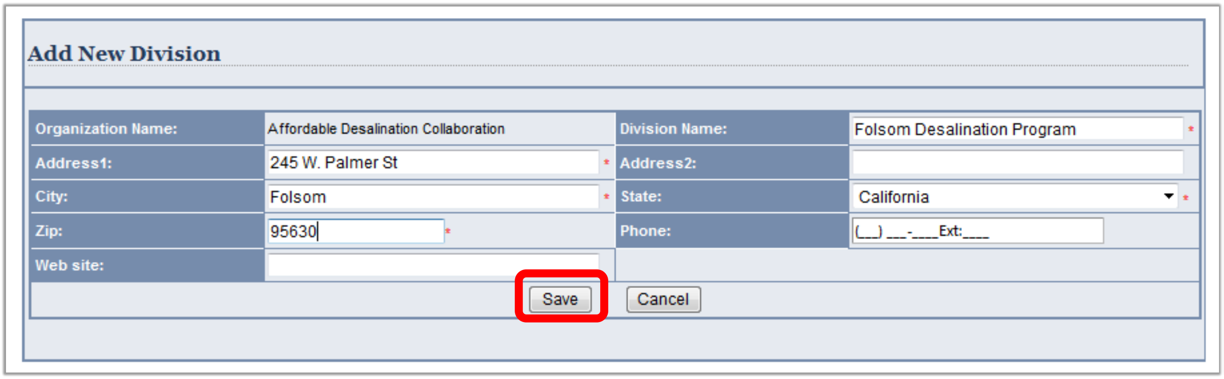
C. Adding a new Division

After searching for and finding your organization, select the drop-down arrow to choose your division and/or address location. If an entry in the **Division/Address** field is not found, it is necessary to add a new one.

Click on the **Add New** hyperlink:

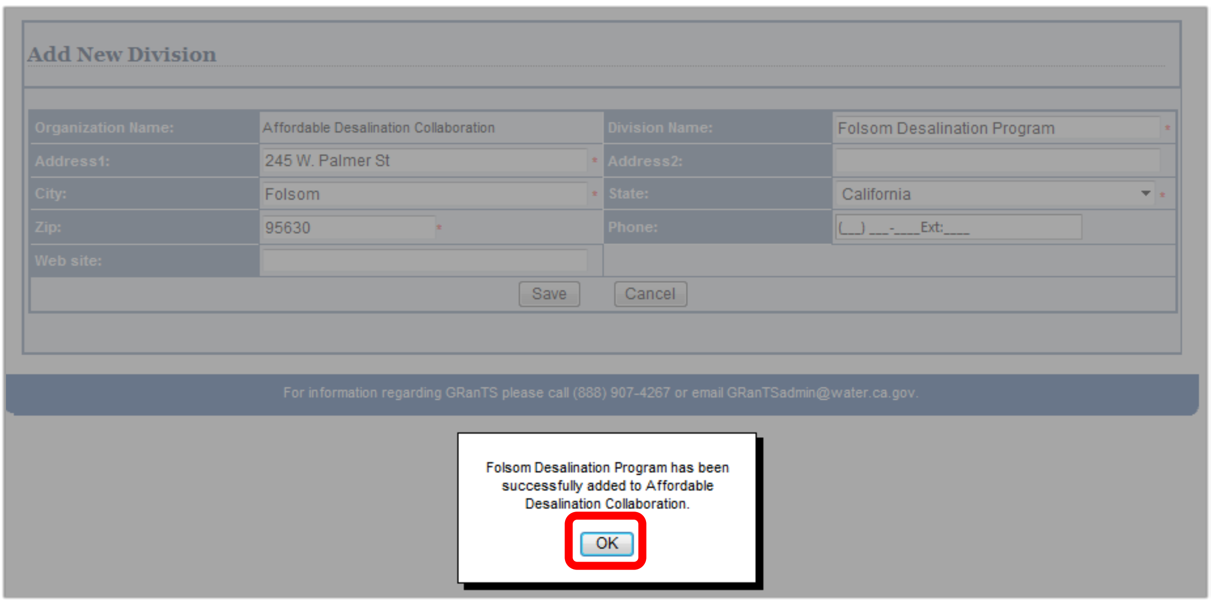


Enter the new division name (i.e. Department of Public Works), address, city, state and phone information on the **Add New Division** panel.



Click on the **Save** button to save the information you entered.

A confirmation screen will appear once the information has successfully saved.



Click on the **OK** button and you will be returned to the original registration panel.

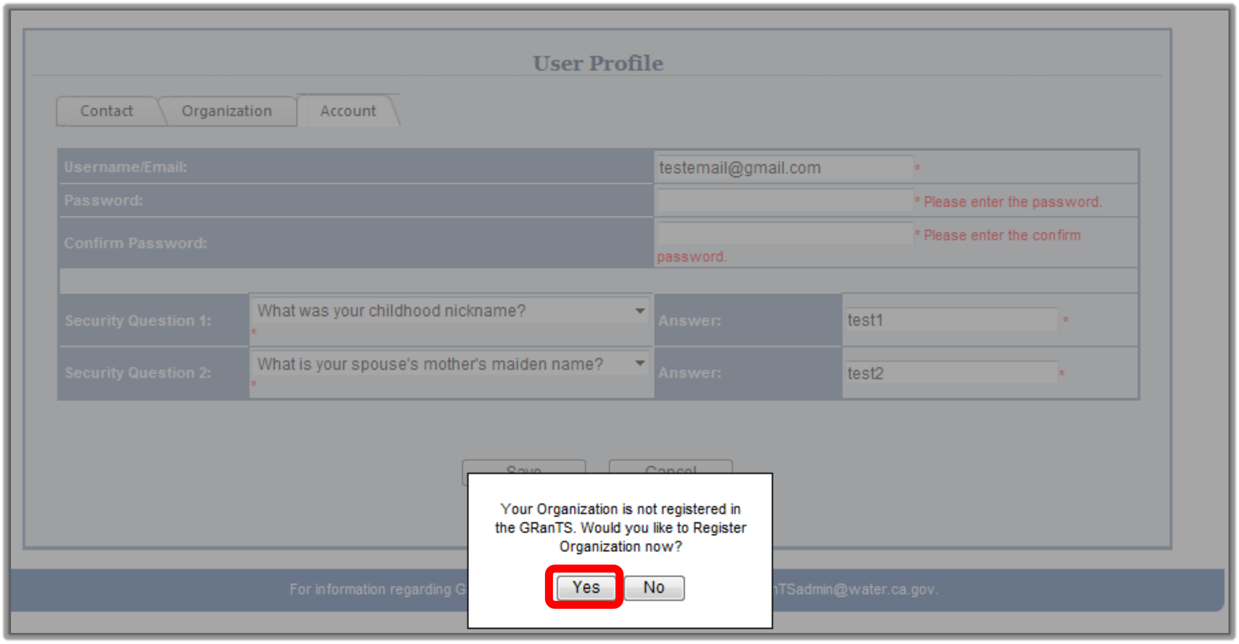
Now you will be able to find both your organization and your division populated in the drop-down menu.

Select the division that was just added from the dropdown menu to populate the address information and click on the **Save** button.

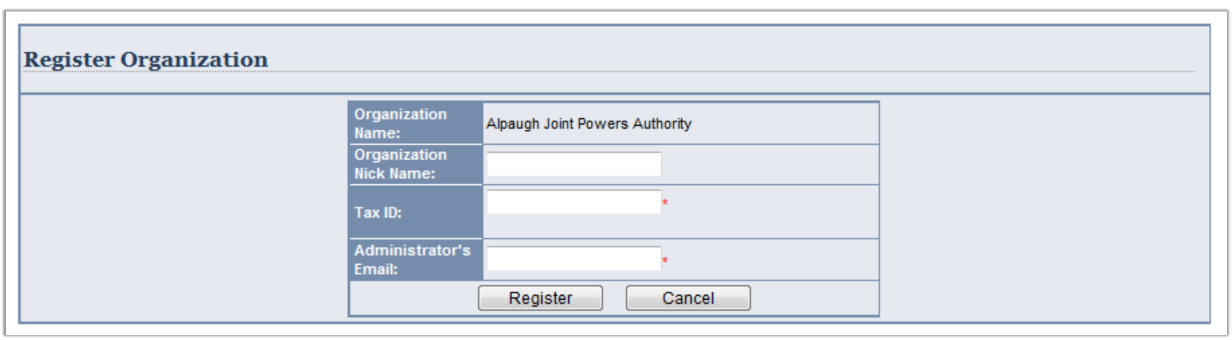
D. Registering an Organization

Organization Registration enables a user to register an organization in GRANTS by providing the Tax Identification Number (TIN) associated with that organization. This process is required for organizations applying for grant funds through DWR. If your organization is not registered, the system will prompt you to register at the end of the user registration process. Only the Organization Administrator may register your organization at a later date.

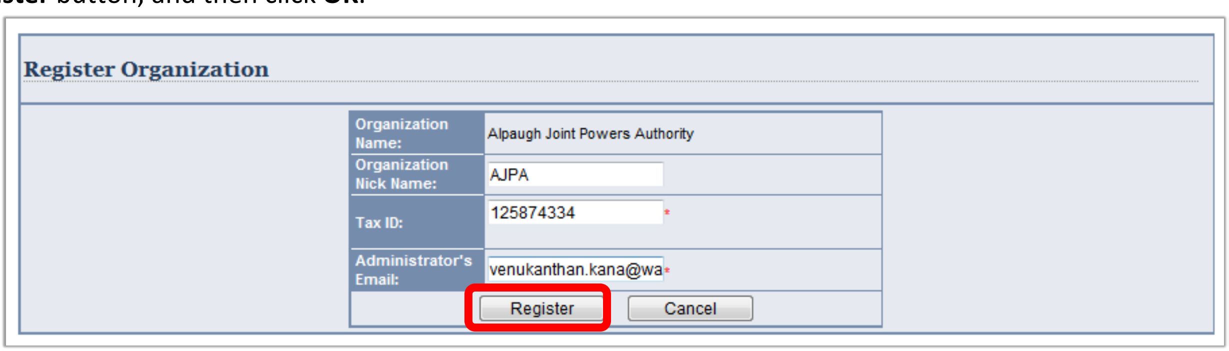
If you register your organization during the user registration process, click on the **Yes** button when asked if you would like to register your organization. You will be assigned as the Organization Administrator at this time.

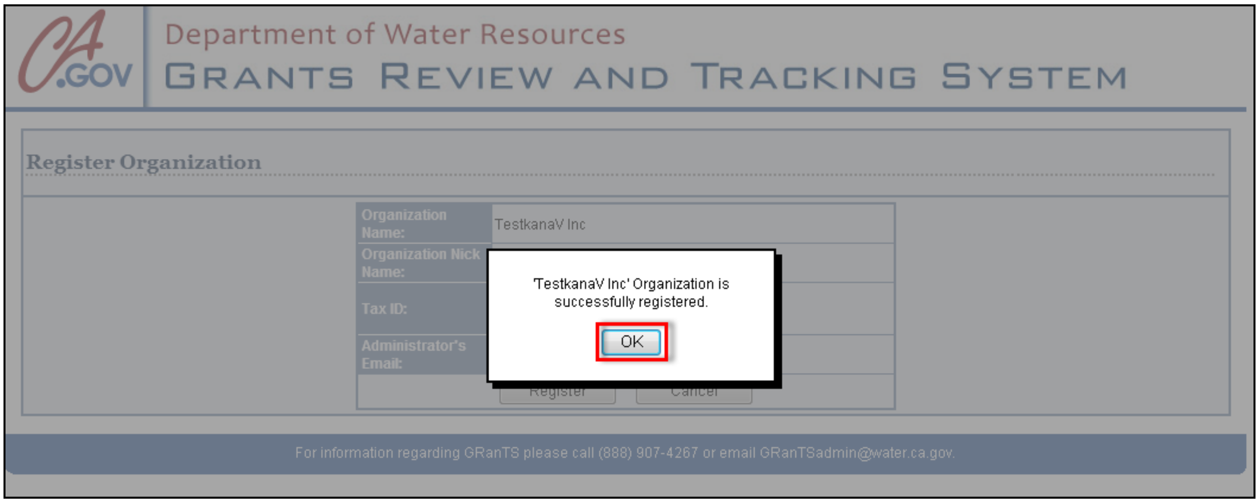


The Public User is redirected to the **Register Organization** page.



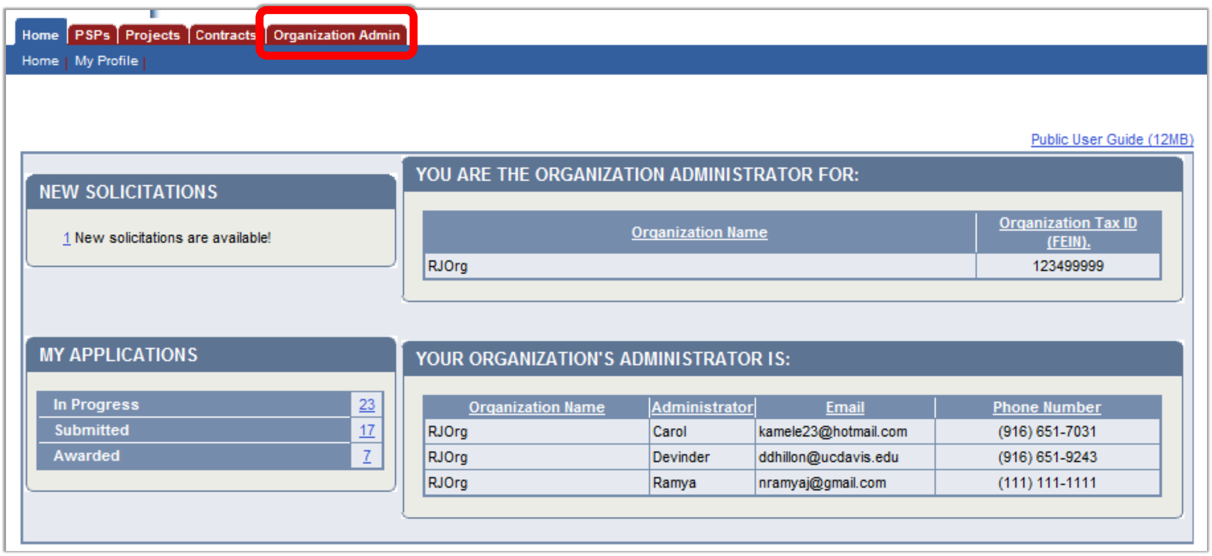
Enter the **Organization Nick Name** (not required), **Tax ID** (TIN) and **Administrator's Email**. Since you are the first user to register for your organization, you will be the Organization Administrator. Click the **Register** button, and then click **OK**.




Department of Water Resources
Grants Review and Tracking System
Register Organization
Organization Name:
TestkanaV Inc
Organization Nick Name:
Tax ID:
Administrator's Email:
'TestkanaV Inc' Organization is successfully registered.
OK
For information regarding GRanTS please call (888) 907-4267 or email GRanTSadmin@water.ca.gov.

VII. Organization Administrator

The GRANTS **Home** page for an Organization Administrator includes an additional tab for **Organization Admin**:



In addition to all of the functions that a general Public User can perform, the Organization Administrator can also:

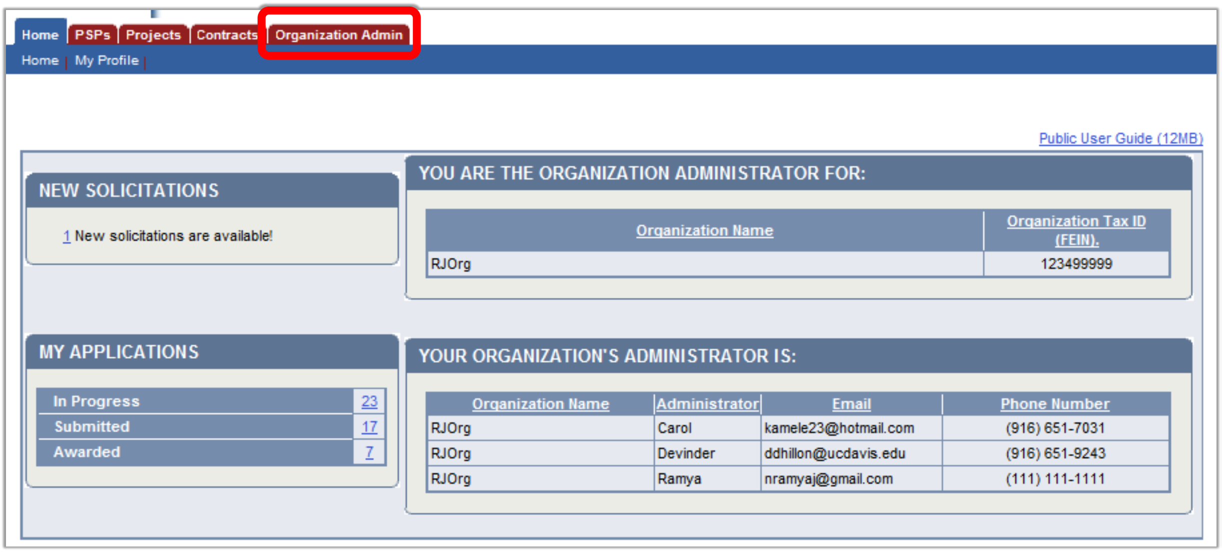
- Change organization name or tax ID information
- Register an organization
- Add or remove public users to/from an organization
- Change permissions for authorized public users of an organization
- Unlock a public user's GRANTS account

The procedure and steps associated with each operation of Organization Administration are discussed in the following section.

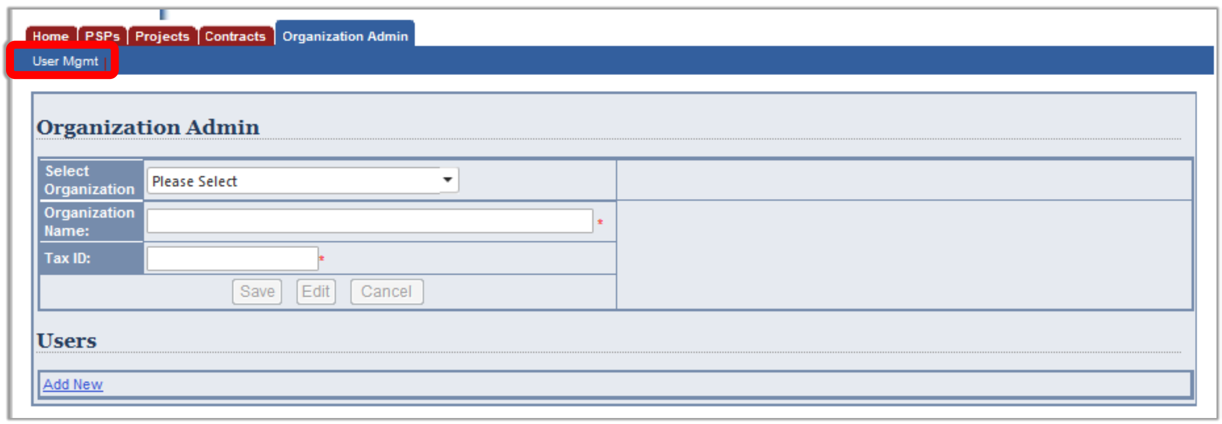
A public user must ask the Organization Administrator for permission to access projects, contracts, and PSPs on behalf of the organization. Once registered in GRANTS under an organization, the user will send an email to or call the Organization's Administrator to ask permission for access.

A. Changing your Organization's name or Tax ID

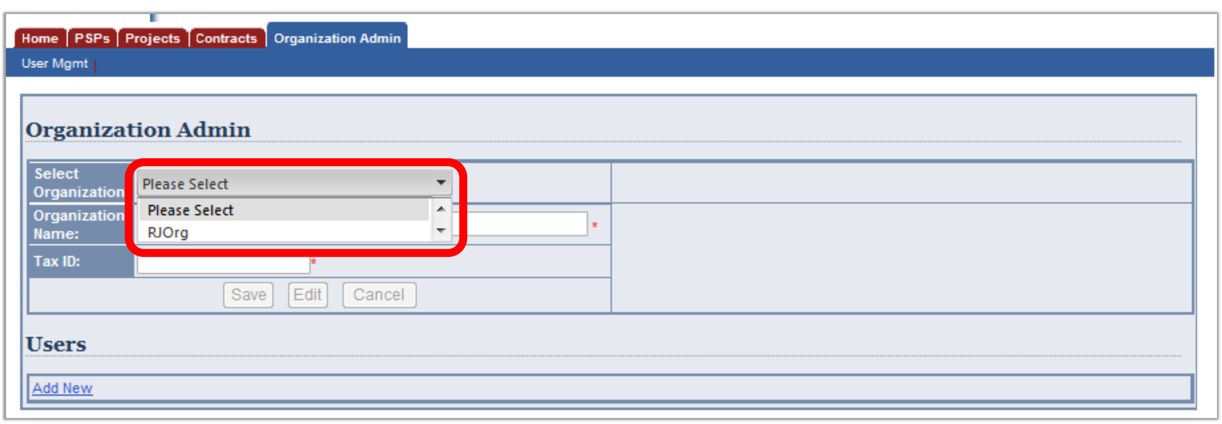
Click on the **Organization Admin** tab on the **Home** page.



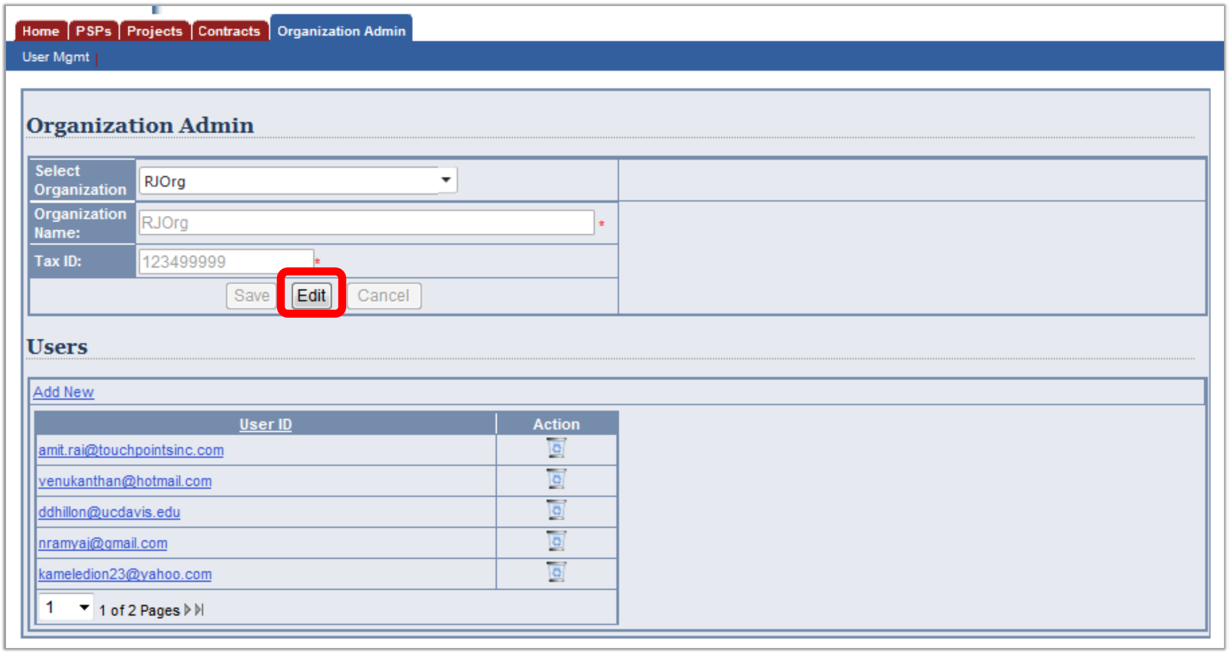
The **User Mgmt** sub-menu item will be visible under the **Organization Admin** tab.



The **Organization Admin** page is displayed. Select an organization from the **Select Organization** dropdown menu.

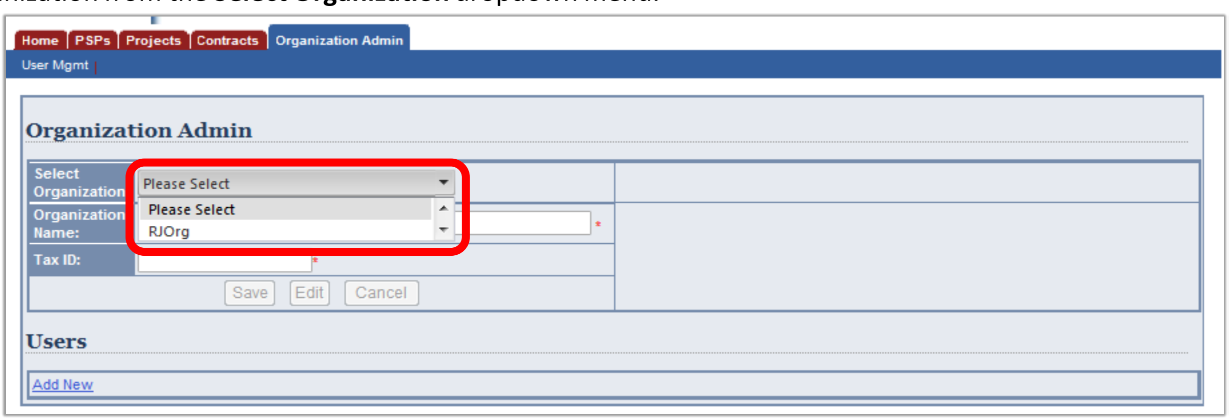


Details about the selected organization can be changed by selecting **Edit**. The entries in the **Organization Name** and **Tax ID** fields can be corrected from this screen. To register an organization at a later date, the Organization Admin enters and saves the Tax ID.

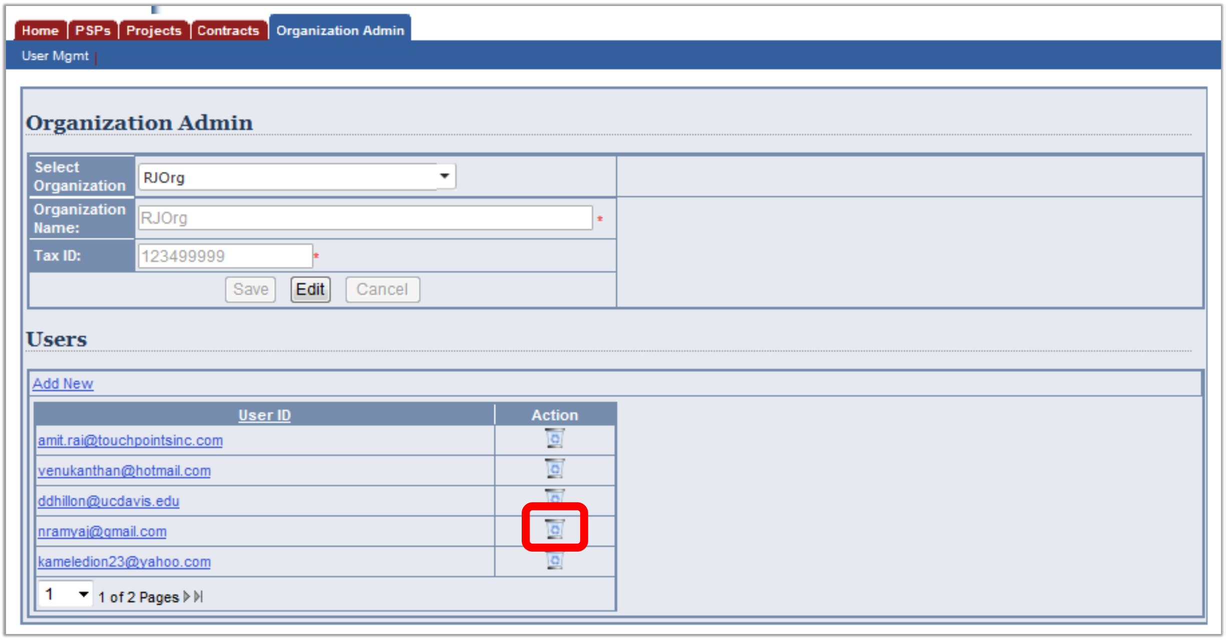


B. Add or Remove Public Users from your Organization

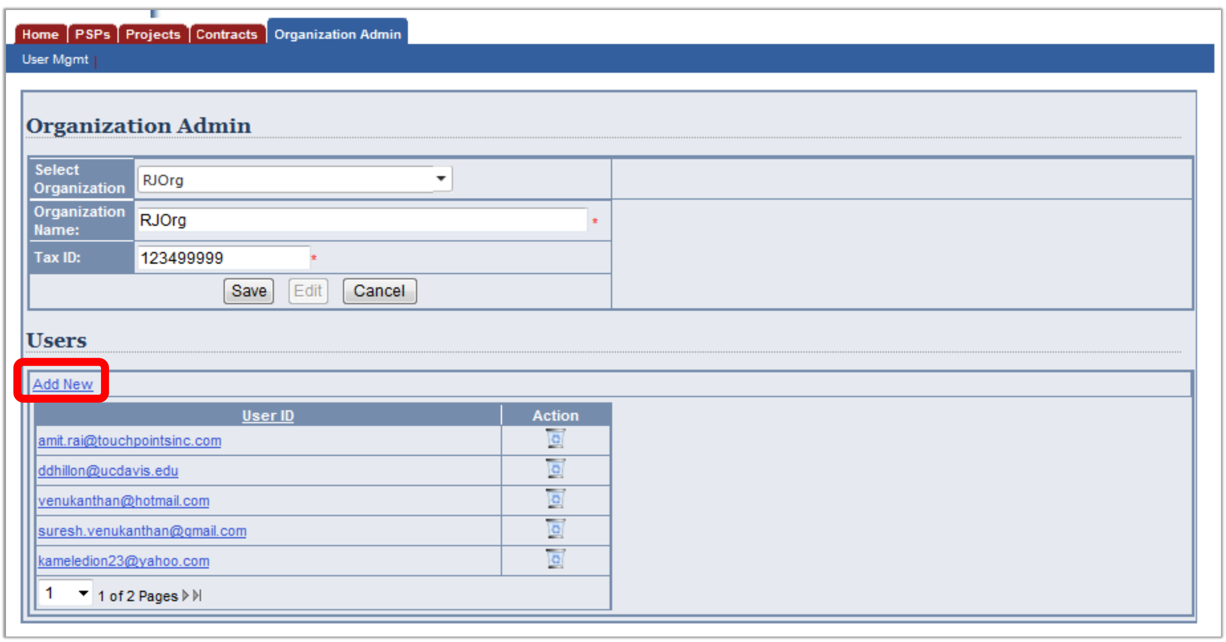
Click on the **Organization Admin** tab on the **Home** page. On the **Organization Admin** page, select an organization from the **Select Organization** dropdown menu.



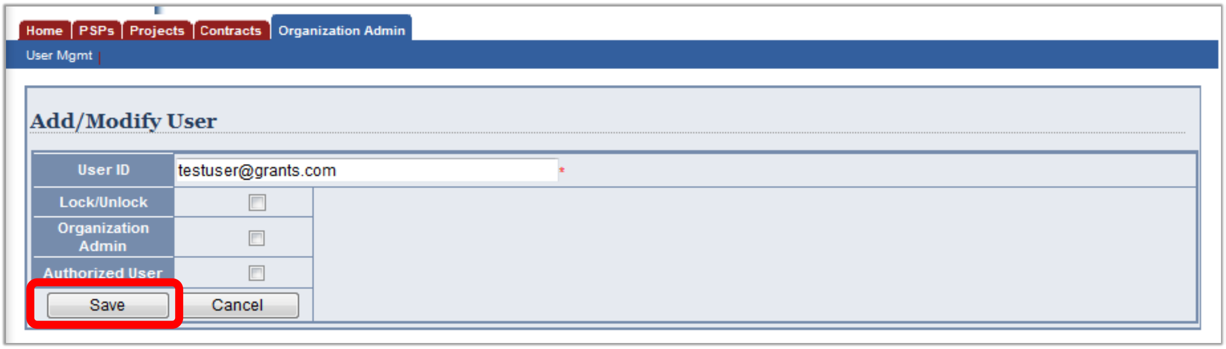
Once an organization is selected, a list of public users registered with that organization will be displayed. To remove a user from your organization, click on the trash can icon to the right of their email address.



To add a new user to your organization, click on the **Add New** hyperlink.



The **Add/Modify User** screen will be displayed. Type the email address of the registered user you want to add to your organization in the **User ID** box.



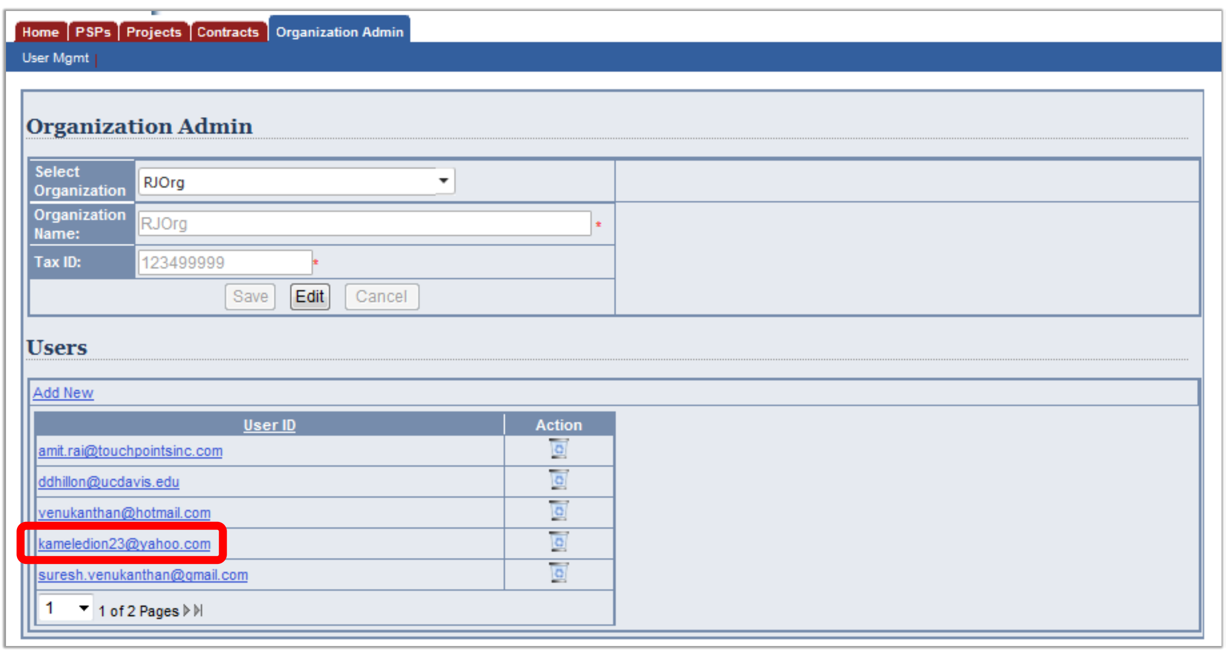
Click on the **Save** button to save the information entered.

If you wish to give them access to your organization's projects, contracts, etc., see section: [Authorize permissions for Public Users of your Organization](#).

Without additional permission, they will only see when PSPs become available and your contact information.

C. Authorize Permissions for Public Users of your Organization

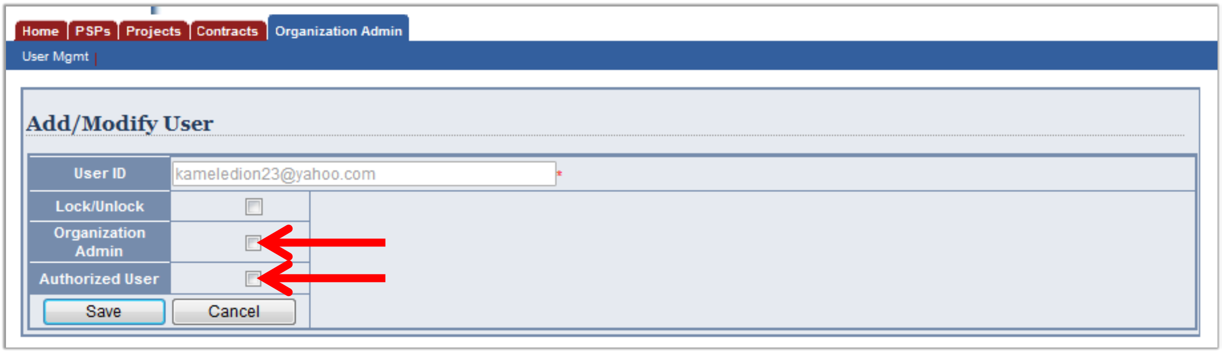
Click on the hyperlinked email of a registered public user on the **Organization Admin** page.



On the **Add/Modify User** page, the Organization Administrator can grant and revoke permissions for different users within their organization:

Check the **Authorized User** checkbox to grant the selected public user access to your proposals, contracts, and projects.

Check the **Authorized User** and **Organization Admin** checkboxes to grant the selected public user access to the Organization Admin tools as well as the proposals, contracts, and projects.



If a user has forgotten their password, the lock/unlock box will be checked. Uncheck the box to allow the user access to the system again.

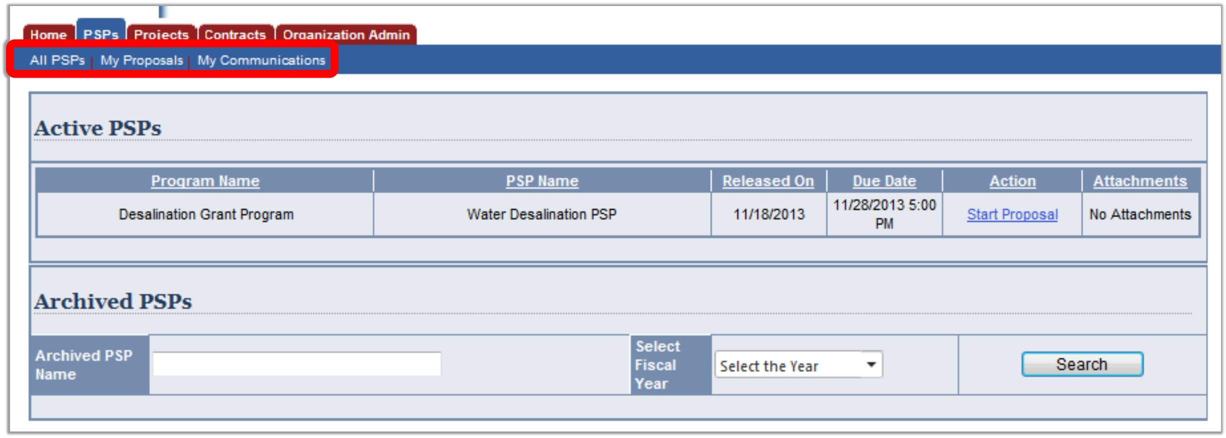
Take caution do not to check the **LOCK** box for a public user. The lock-out function will disable the user's access to the entire GRANTS system. If you intend to remove a user from your organization you can uncheck the **Authorized User** box or delete the public user from your organization.

VIII. Preparing Proposal Solicitation Packages

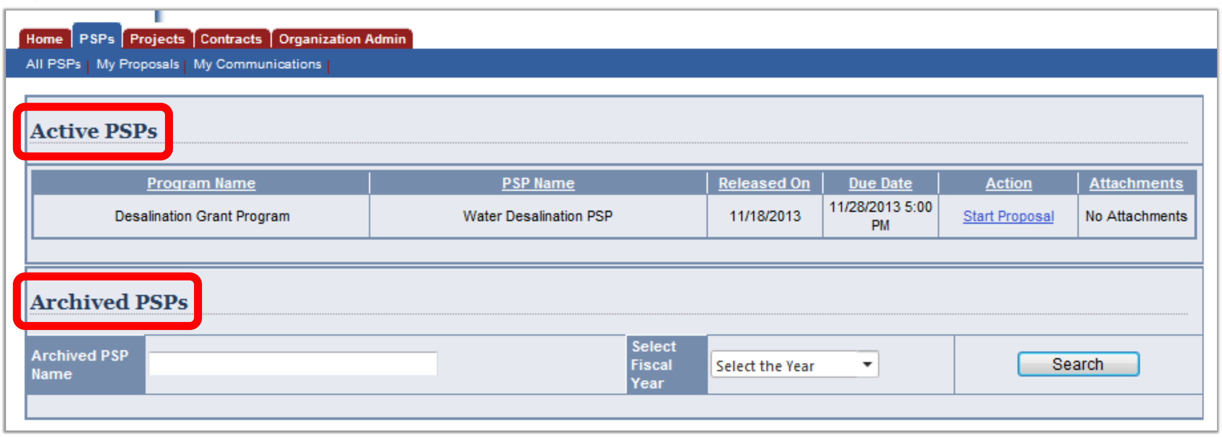
Proposal Solicitation Packages (PSPs) can be released to the public through the GRANTS. PSPs can also be called RFPs (Requests for Proposals). The online application process enables DWR to capture electronic proposal data and review these proposals online.

On the **PSPs** tab, the following three submenus will be visible:

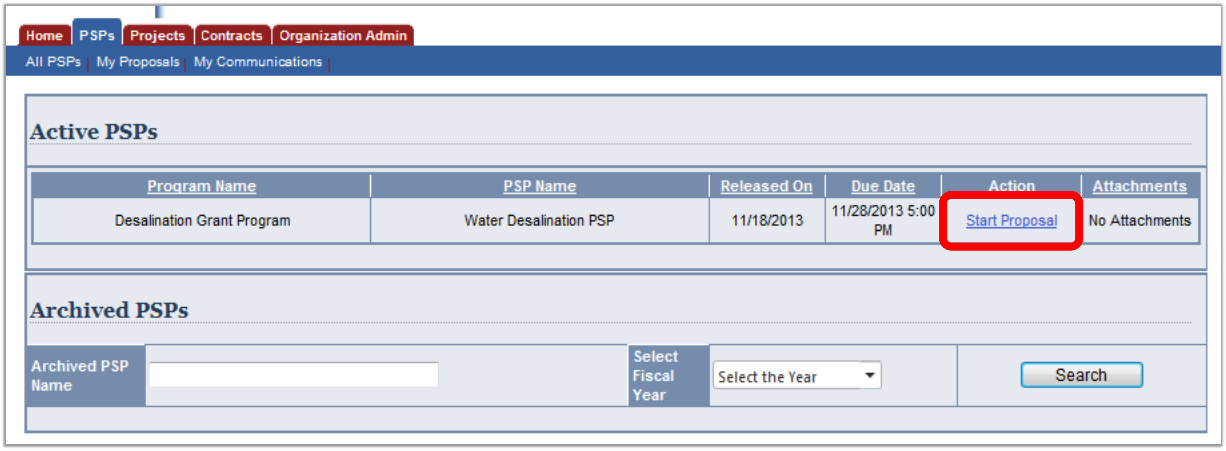
- All PSPs
- My Proposals
- My Communications



The page also lists the **Active PSPs** and **Archived PSPs**.



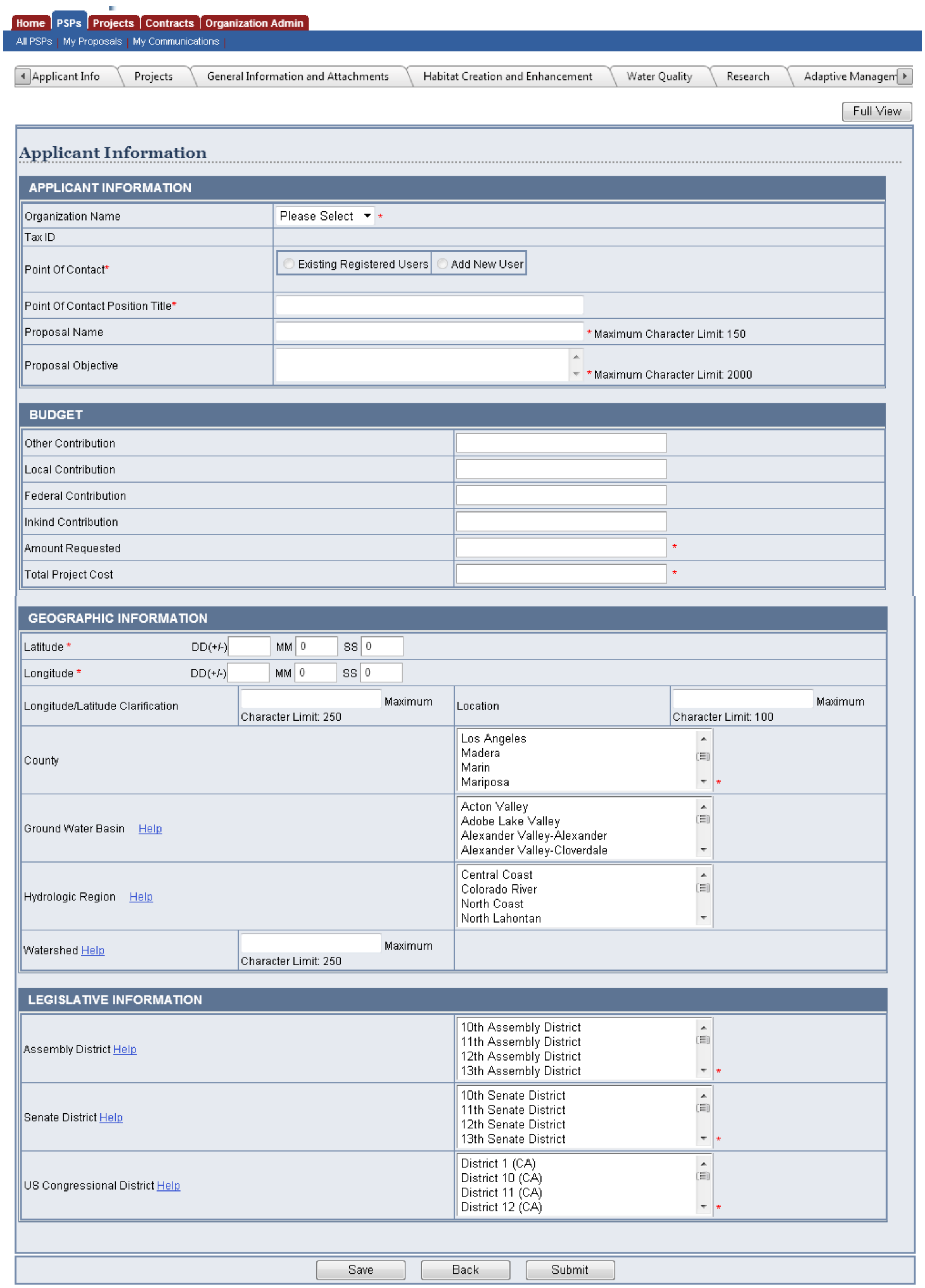
On the page listing the active and archived PSPs, click on the **Start Proposal** hyperlink for the **PSP Name** to start an application.



A. Starting a Proposal

Department of Water Resources has many programs that administer Proposal Solicitation Packages. In order to find specific information about the questions in the PSP, navigate to DWR Program Funding Website Links. All of the information in each application process is explained in the Program Guidelines on the website for that program.

The proposal form will look similar to this:


Home | PSPs | Projects | Contracts | Organization Admin

All PSPs | My Proposals | My Communications |

Applicant Info | Projects | General Information and Attachments | Habitat Creation and Enhancement | Water Quality | Research | Adaptive Managem

Full View

Applicant Information

APPLICANT INFORMATION	
Organization Name	Please Select *
Tax ID	
Point Of Contact*	Existing Registered Users / Add New User
Point Of Contact Position Title*	
Proposal Name	* Maximum Character Limit: 150
Proposal Objective	* Maximum Character Limit: 2000

BUDGET	
Other Contribution	
Local Contribution	
Federal Contribution	
Inkind Contribution	
Amount Requested	*
Total Project Cost	*

GEOGRAPHIC INFORMATION			
Latitude *	DD(+/-) MM 0 SS 0		
Longitude *	DD(+/-) MM 0 SS 0		
Longitude/Latitude Clarification	Maximum Character Limit: 250	Location	Maximum Character Limit: 100
County		Los Angeles Madera Marin Mariposa *	
Ground Water Basin Help		Acton Valley Adobe Lake Valley Alexander Valley-Alexander Alexander Valley-Cloverdale	
Hydrologic Region Help		Central Coast Colorado River North Coast North Lahontan	
Watershed Help	Maximum Character Limit: 250		

LEGISLATIVE INFORMATION	
Assembly District Help	10th Assembly District 11th Assembly District 12th Assembly District 13th Assembly District *
Senate District Help	10th Senate District 11th Senate District 12th Senate District 13th Senate District *
US Congressional District Help	District 1 (CA) District 10 (CA) District 11 (CA) District 12 (CA) *

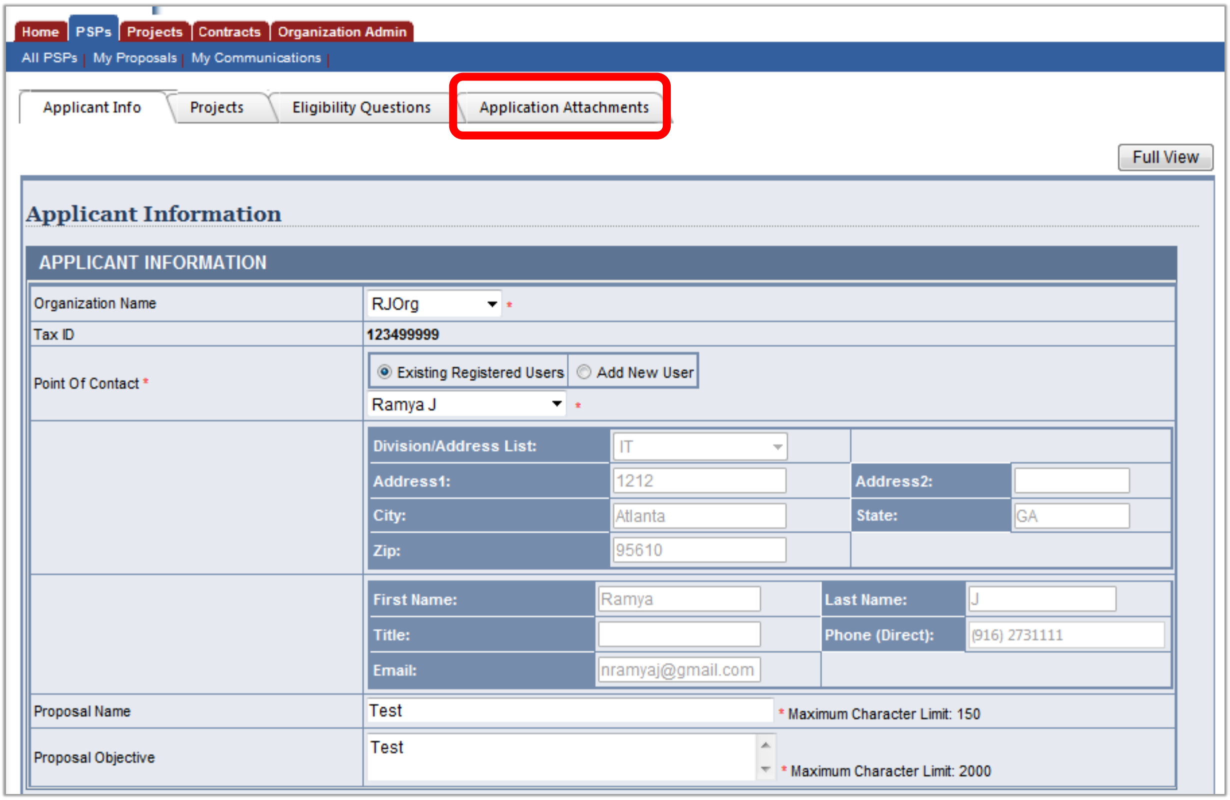
Save | Back | Submit

Click on the **Save** button after entering information on each page. Click on the other sections to navigate to them and enter details.

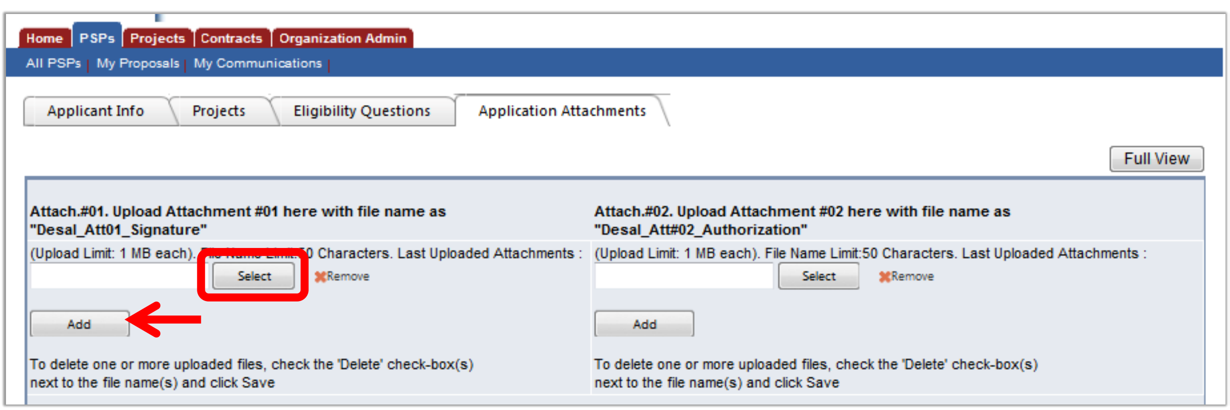
If you receive an error on the Applicant Information page noting that you are not authorized to create a PSP, double check that your organization has been registered and that your account has been authorized by your Organization Administrator. Instructions for these steps can be found in the Authorize a User and Organization Registration sections of this guide.

B. Uploading Proposal Attachments

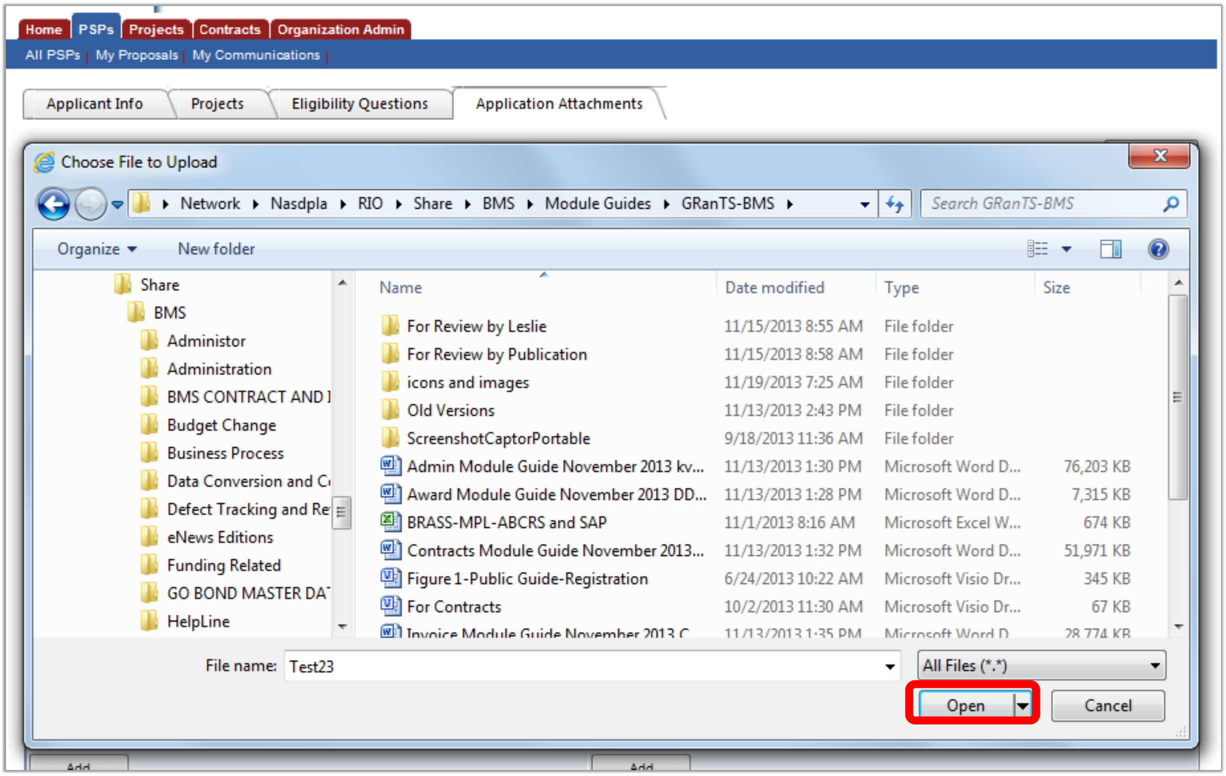
The following instructions will help you upload attachments to a proposal in GRANTS. Once the required fields of the Applicant Info tab are filled out, you can click on the Application Attachments tab to navigate to the page where you can go to upload necessary attachments to your proposal.



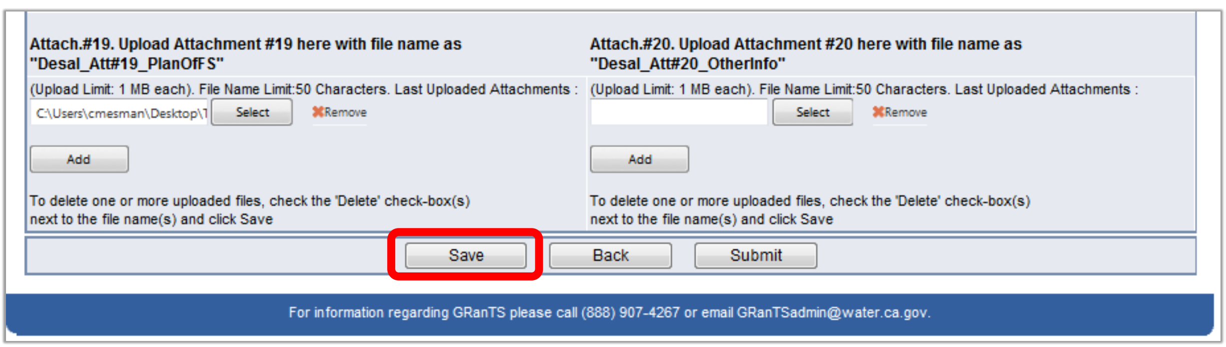
Click on the **Select** button to select which file you wish to upload. To upload more than one file, click the **Add** button and another upload slot will appear. There is a maximum of 5 upload slots per question.



Browse through your computer for the file you want to upload. Select the file (restricted to one file per upload slot) and click on the **Open** button.



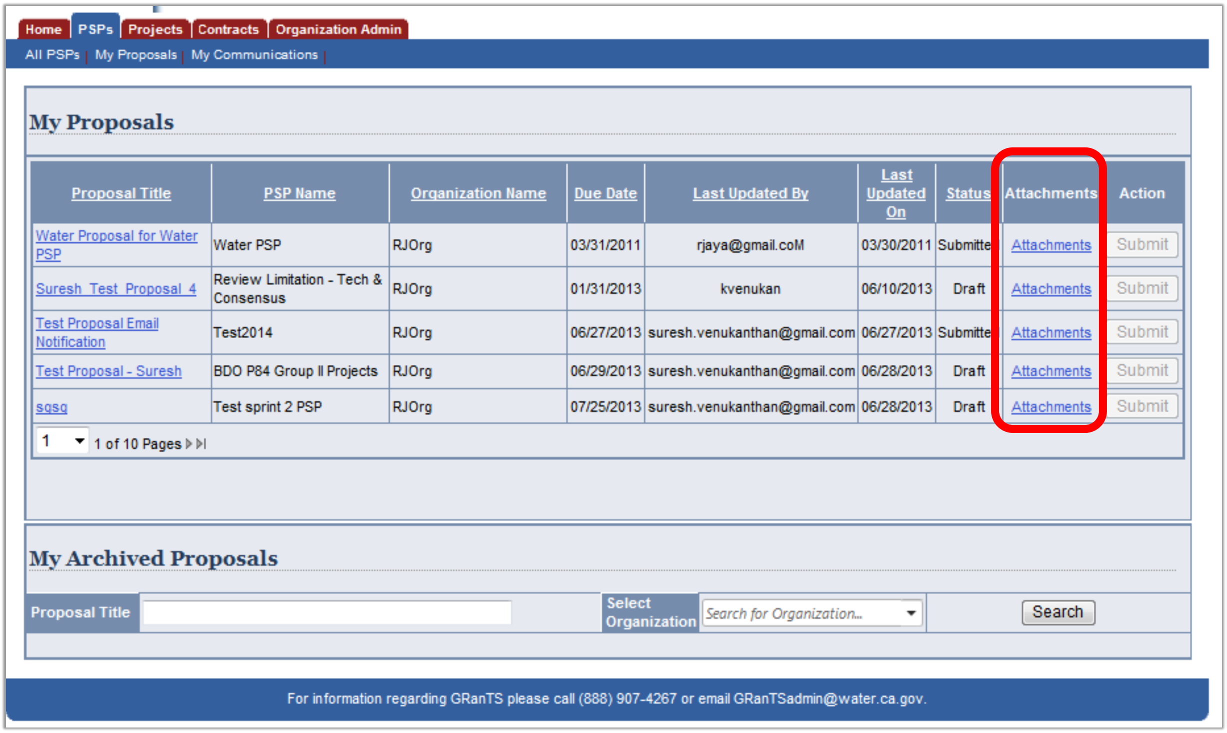
Repeat steps 1-3 for the all the attachments you wish to upload to the displayed page.



Scroll to the bottom of the page and click on the **Save** button. Wait for the GRanTS to confirm the save.

Uploading large amounts of data online may take some time. Be sure to wait for confirmation before performing any other actions in GRanTS.

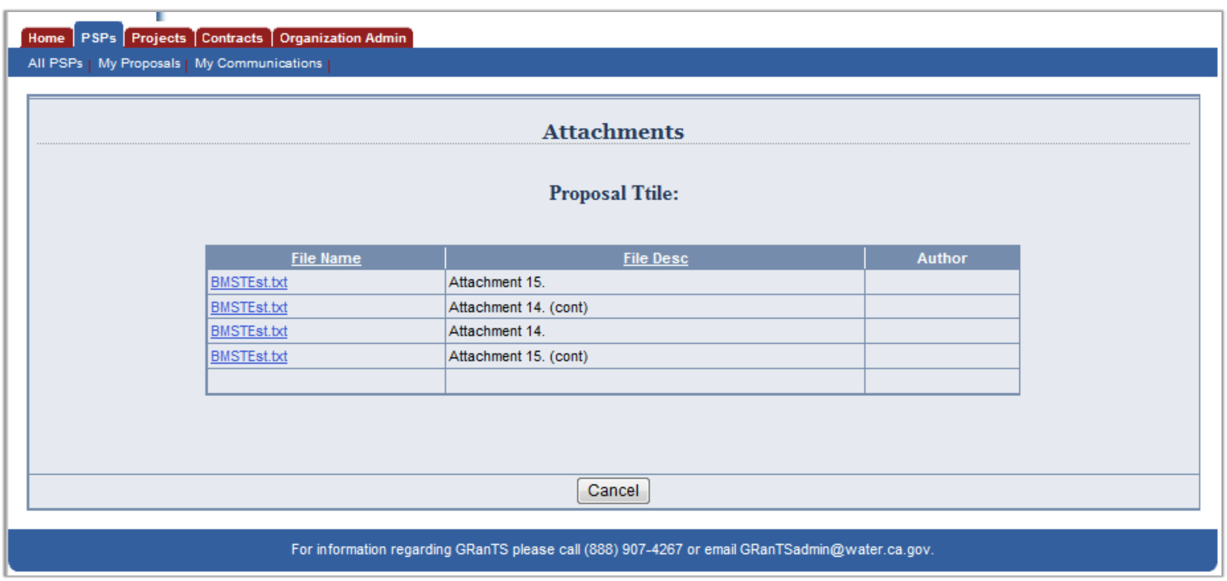
You can navigate to **My Proposals** under the **PSP** tab and select the **Attachments** link to view all of the attachments that have been uploaded for a given proposal.



Proposal Title	PSP Name	Organization Name	Due Date	Last Updated By	Last Updated On	Status	Attachments	Action
Water Proposal for Water PSP	Water PSP	RJOrg	03/31/2011	rjaya@gmail.coM	03/30/2011	Submitte	Attachments	Submit
Suresh_Test_Proposal_4	Review Limitation - Tech & Consensus	RJOrg	01/31/2013	kvenukan	06/10/2013	Draft	Attachments	Submit
Test Proposal Email Notification	Test2014	RJOrg	06/27/2013	suresh.venukanthan@gmail.com	06/27/2013	Submitte	Attachments	Submit
Test Proposal - Suresh	BDO P84 Group II Projects	RJOrg	06/29/2013	suresh.venukanthan@gmail.com	06/28/2013	Draft	Attachments	Submit
sqsq	Test sprint 2 PSP	RJOrg	07/25/2013	suresh.venukanthan@gmail.com	06/28/2013	Draft	Attachments	Submit

1 of 10 Pages

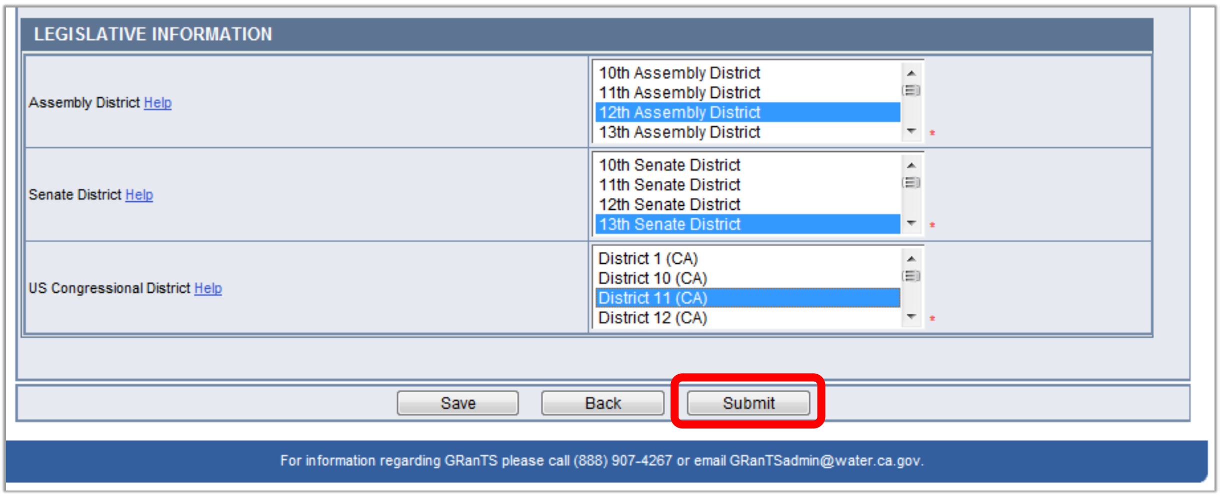
This shows you a full list of your proposal attachments from all sections of the application. We recommend you open the attached files to ensure they are the correct version if you have uploaded revisions several times.



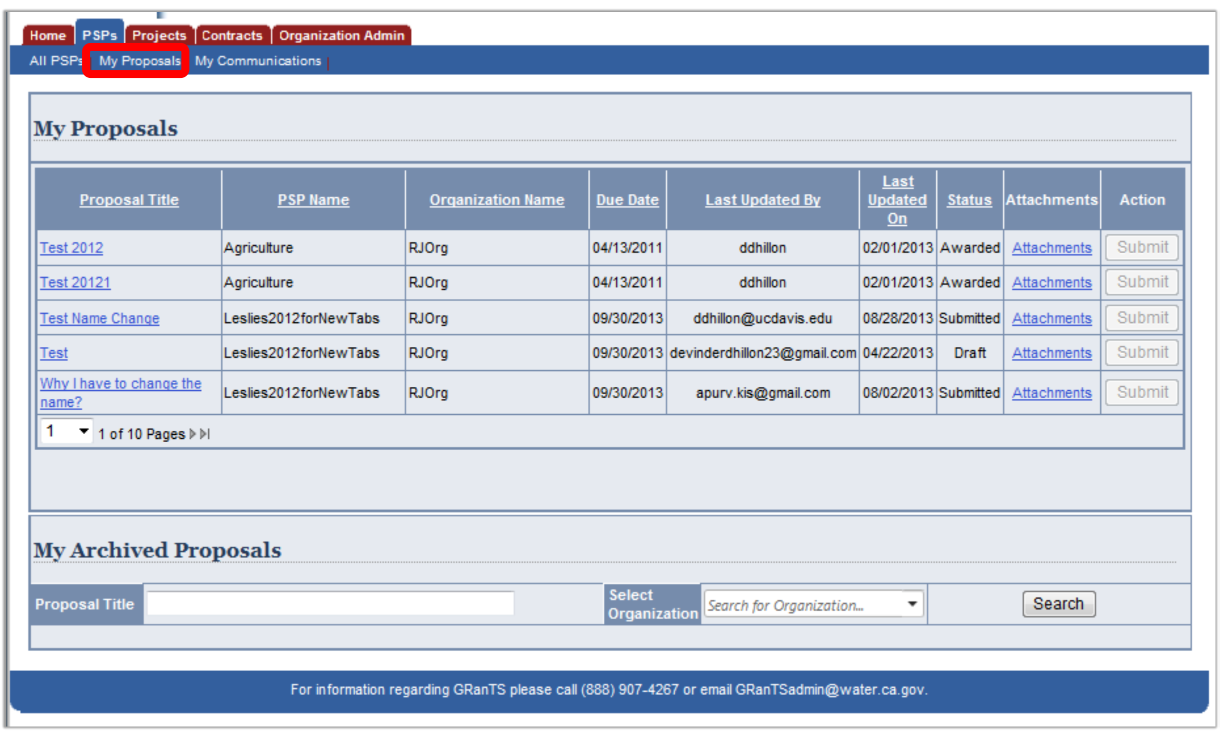
File Name	File Desc	Author
BMSTEst.txt	Attachment 15.	
BMSTEst.txt	Attachment 14. (cont)	
BMSTEst.txt	Attachment 14.	
BMSTEst.txt	Attachment 15. (cont)	

C. Submitting Proposals

A proposal can be submitted any number of times until the deadline for the PSP. If you submit a proposal and later wish to make changes to the proposal simply open the proposal, make the changes, and click on the **Submit** button again. Clicking on the **Submit** button on one section submits all sections of the proposal.

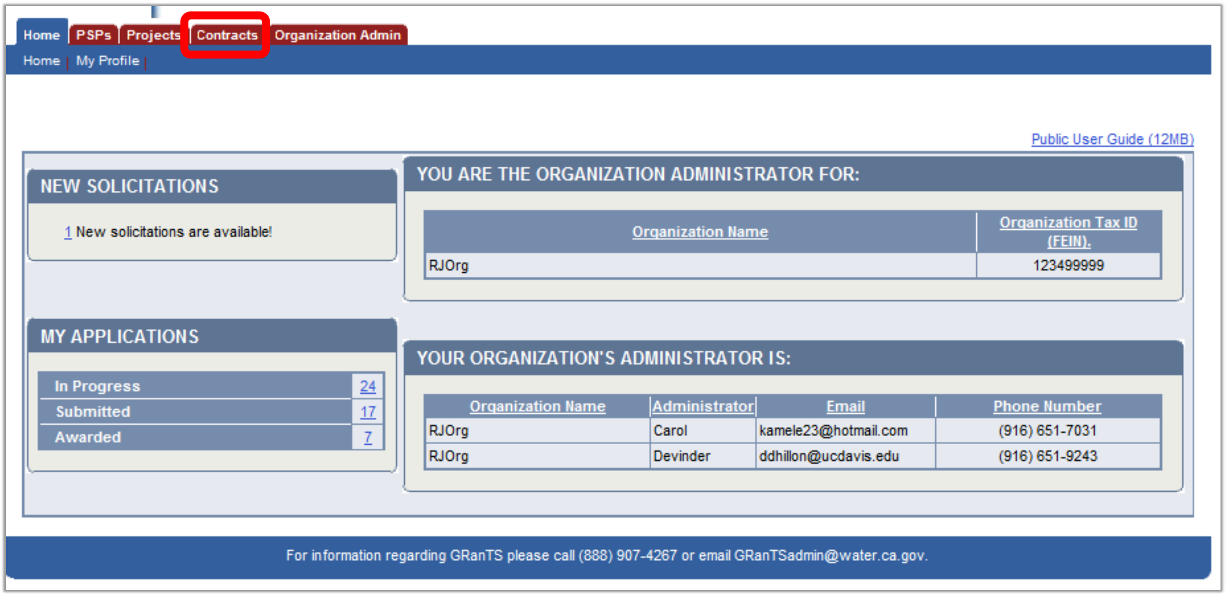


Your proposals will be saved under the **My Proposals** submenu item under the **PSP** tab.

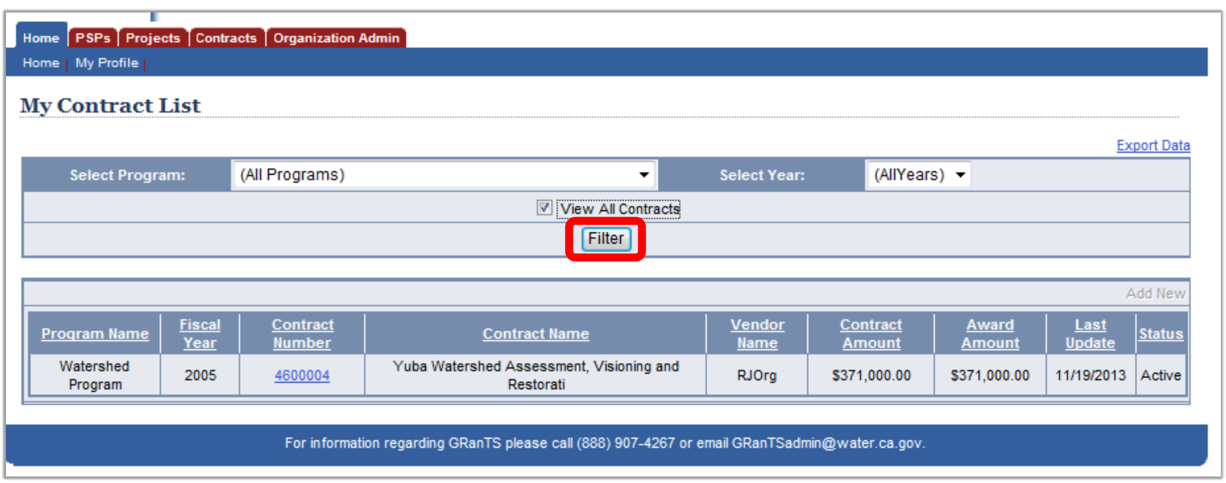


IX. Viewing Contracts

Click on the **Contracts** tab on the **Home** page.



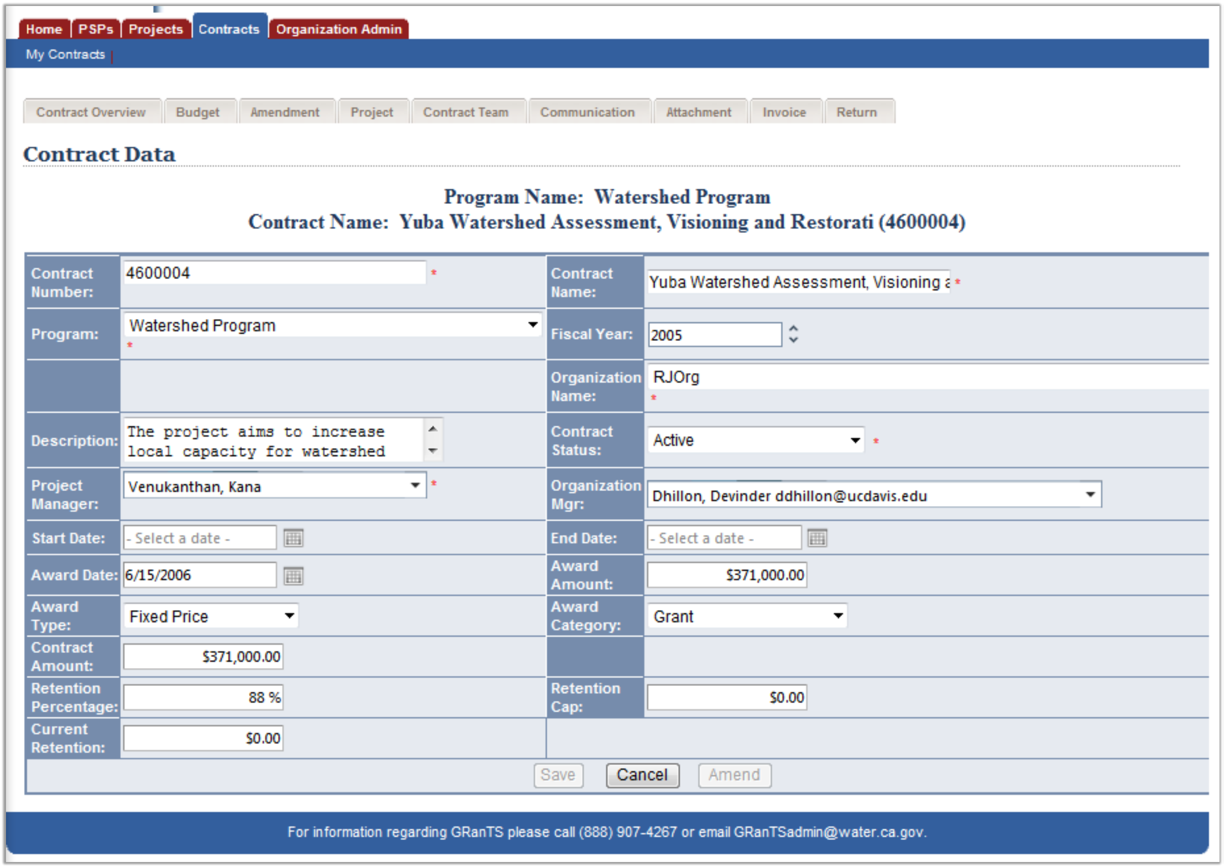
The **My Contracts** page will be displayed showing all of the Contracts that you have been assigned to as a part of the contract team.



Click **View All Contracts** and then **Filter**, to see all Contracts for that organization. You can also filter by DWR Program and Year.

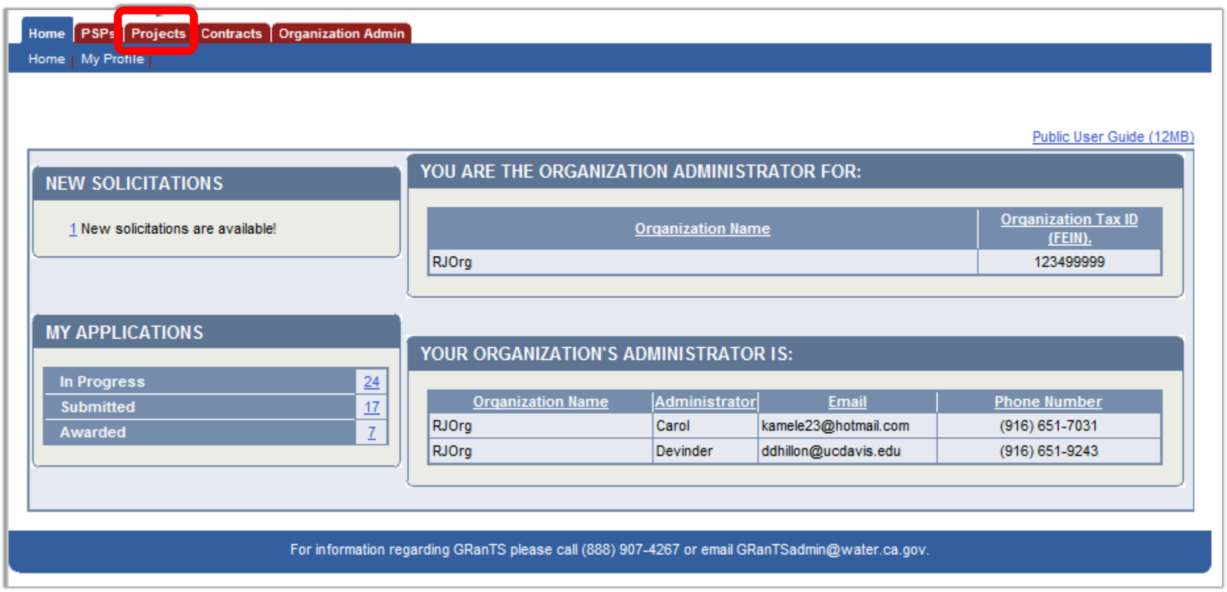
Click on the hyperlinked **Contract Number** to display the details of the Contract.

The **Contract Workbook** is displayed with the details of your contract with DWR. Most data will be view only. If you see any errors or items that need to be changed, please contact your DWR contract manager.

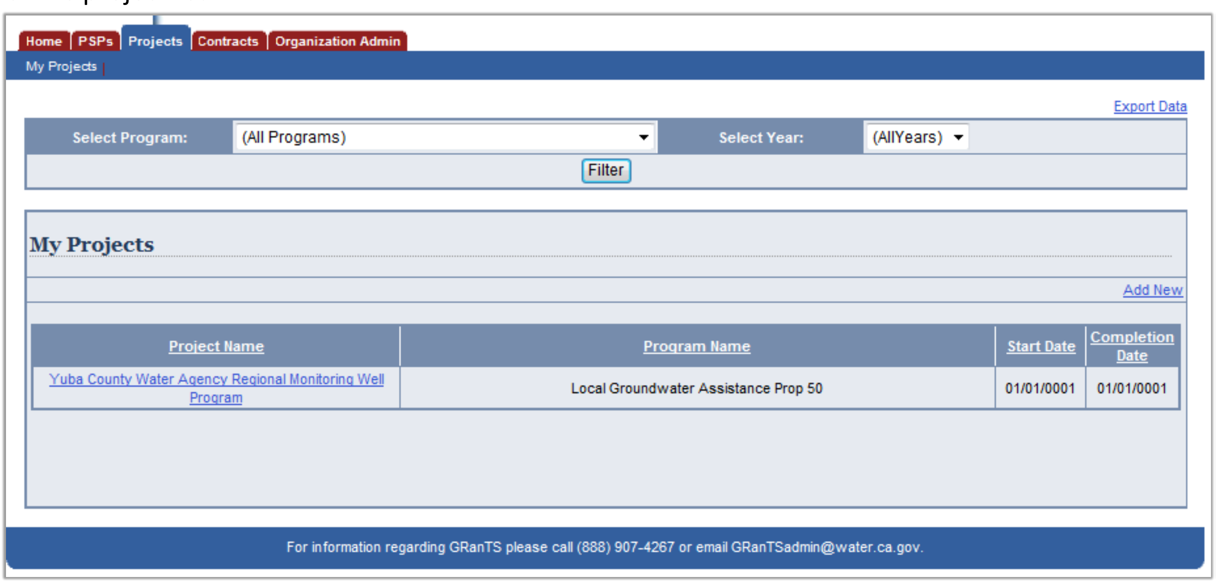


X. Viewing Projects

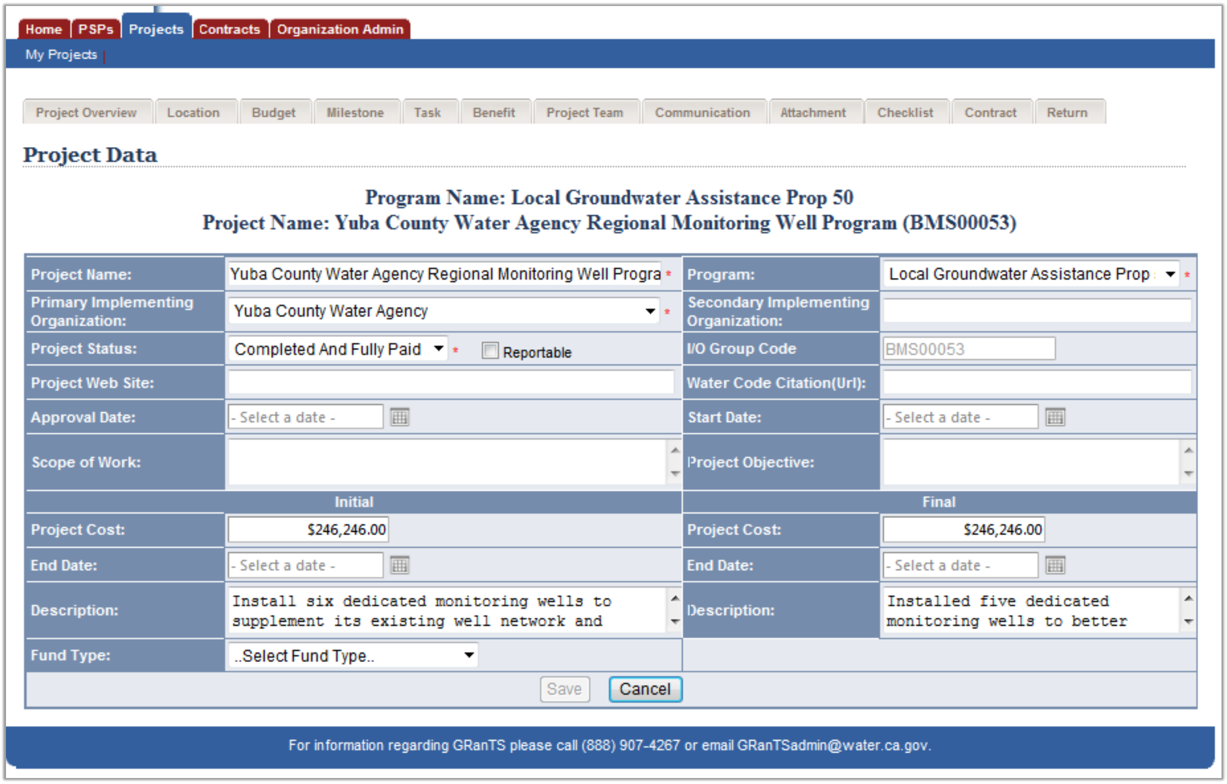
Select the **Projects** tab on the **Home** page.



The **My Projects** page will be displayed. This page shows all of the projects for which you are listed as a part of the project team.

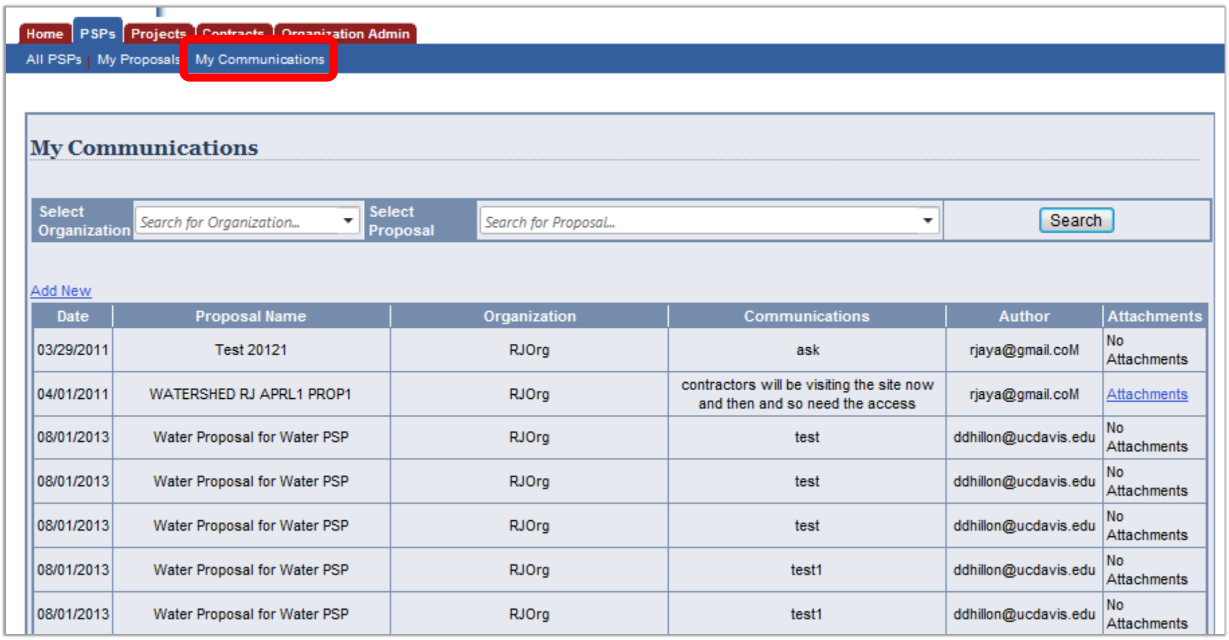


In the **Projects Workbook** you can see the details of your projects under contract with DWR. If you see any errors or items that need to be changed, please contact your DWR project manager.

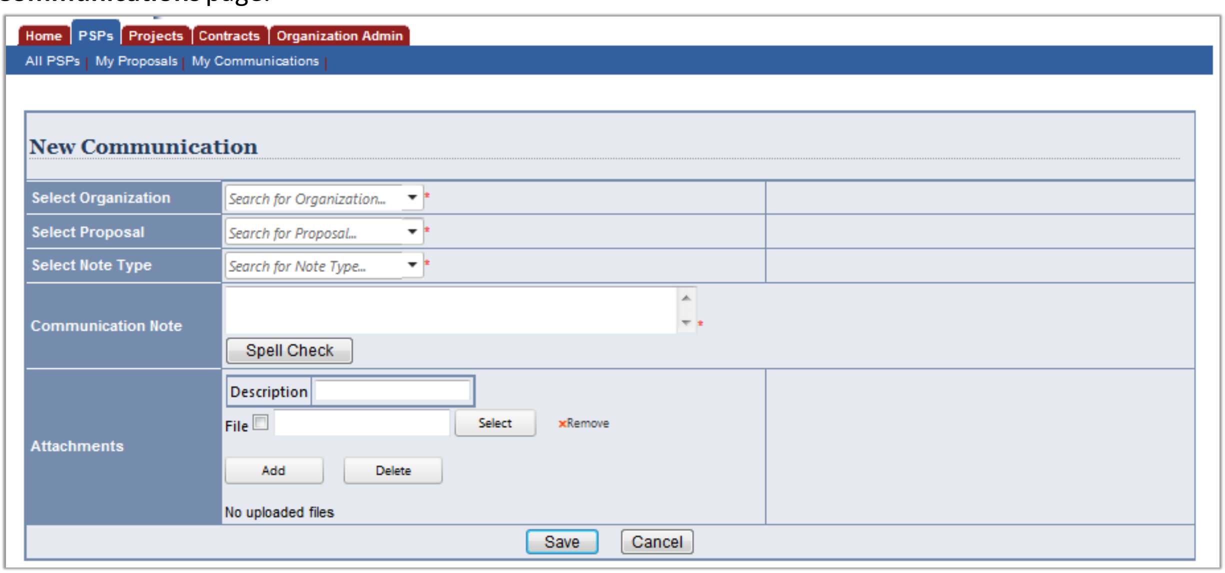


XI. Communications and Attachments

In the Contract, Project, Invoice, and PSP modules you will find **Communications** and **Attachments** tools. These tools have been created as a place to store critical information and documents regarding the Proposal, Contract, Project, or Invoice with which the communication or attachment is associated. All communications and attachments are visible to DWR staff assigned to the Project, Contract, or Proposal. There is an upload feature within the **Communications** tool to provide for attachments as well. In the **PSPs** module, for example, click on the **My Communications** submenu tab and the **My Communications** page will be displayed.



Each entry on this page has the following details: **Date**, **Proposal Name**, **Organization**, **Communications**, **Author**, and **Attachments**. An **Add New** hyperlink is also displayed to add new communications on the **My Communications** page.



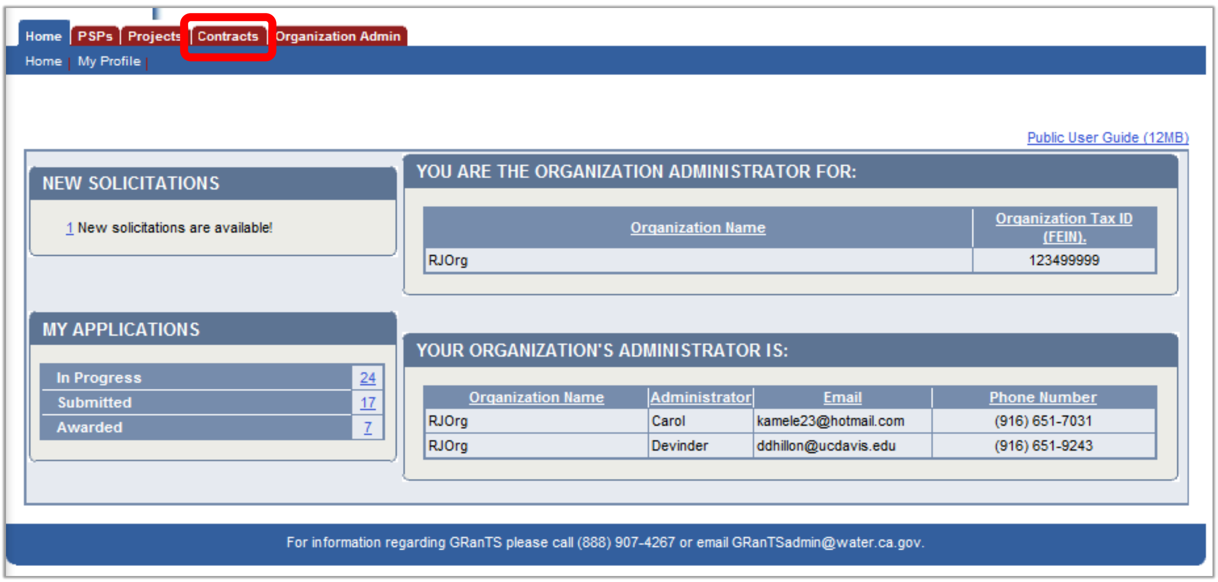
XII. Working with Invoices

The **Invoice** tab of the contract workbook enables a public user to:

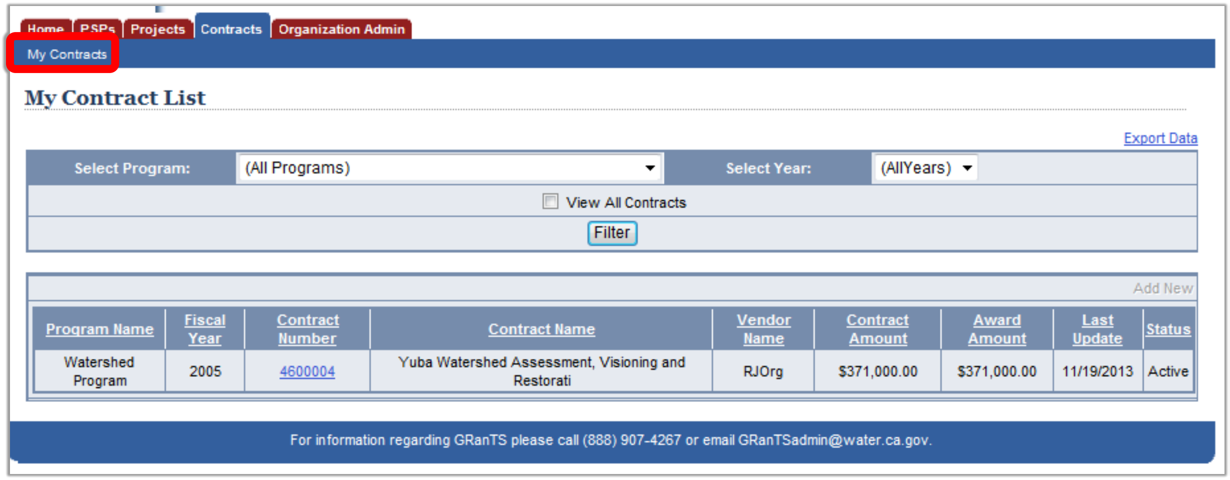
- Prepare an Invoice for a Contract
- Save an Invoice for completion at a later time
- Submit an Invoice for a Contract
- Add/edit Attachment(s) for an Invoice
- Add/edit Communication Note(s) for an Invoice

The invoice feature in GRANTS allows for task level tracking of Bond expenditures throughout the life of the contract. The following process describes the general use of the system.

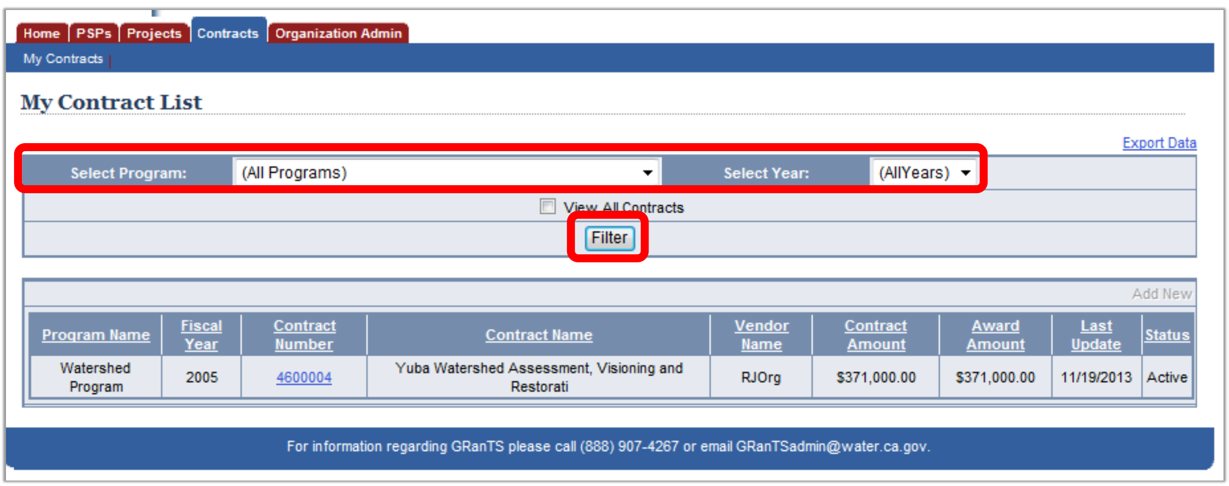
Select the **Contracts** Module tab from the **Home Page**.



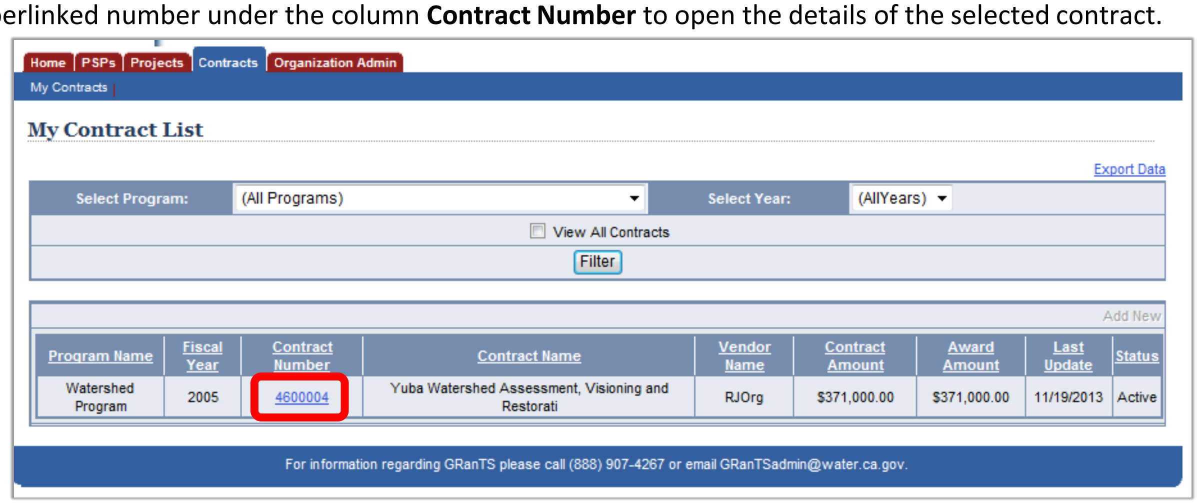
Under the **Contracts** Module tab, select the **My Contracts** sub-module.



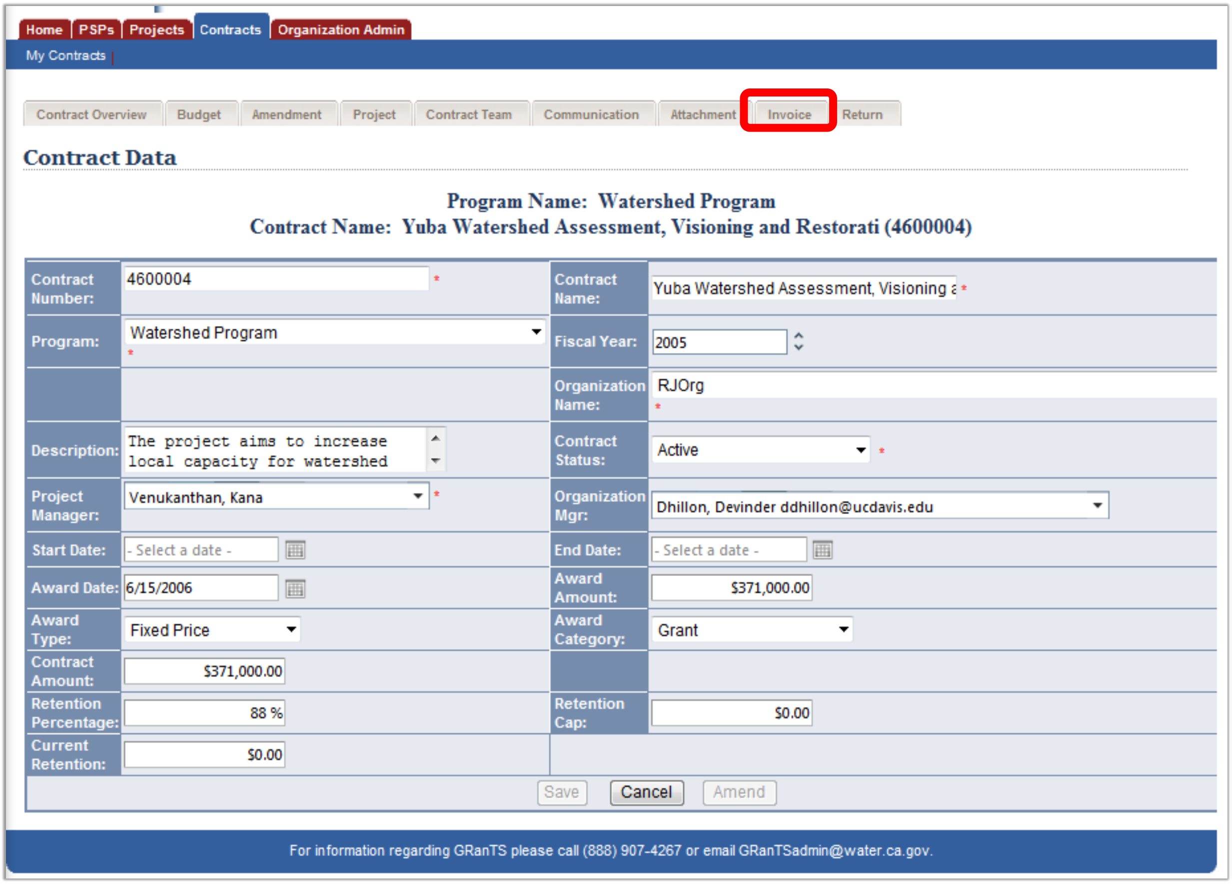
On the **My Contracts** page, select a Program from the **Select Program** dropdown field. Next, select a fiscal year from the **Select Year** dropdown field. To view your organization's completed or closed out contracts, select the **View All Contracts** option. Click on the **Filter** button once you have made your selections.



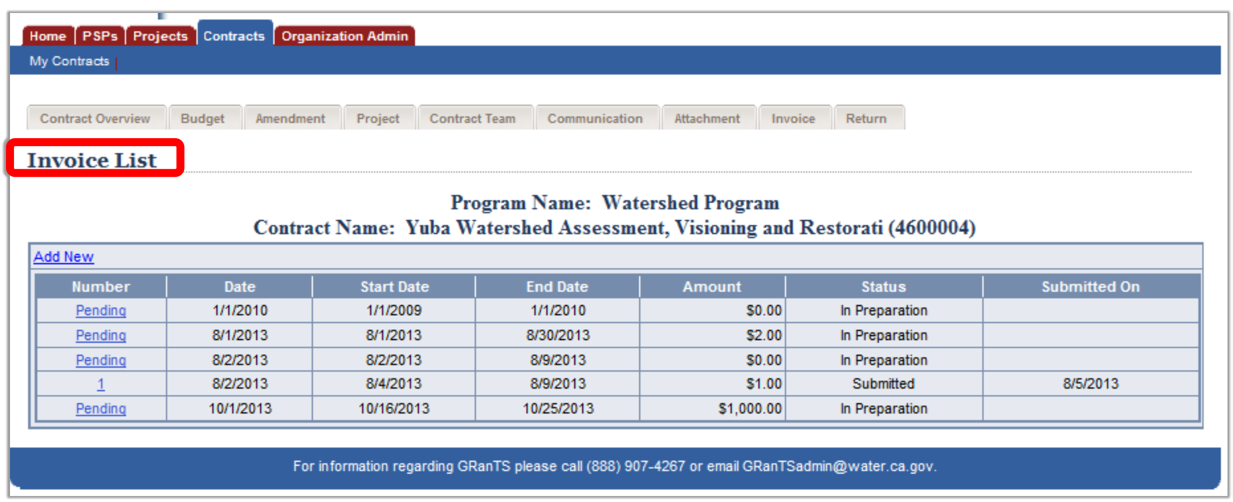
The Active contracts being managed by your agency will also be listed on this screen. Click on the hyperlinked number under the column **Contract Number** to open the details of the selected contract.



The **Invoice** workbook tab is found in the submenu for the Contracts Module. Use this tab to access Invoice information.



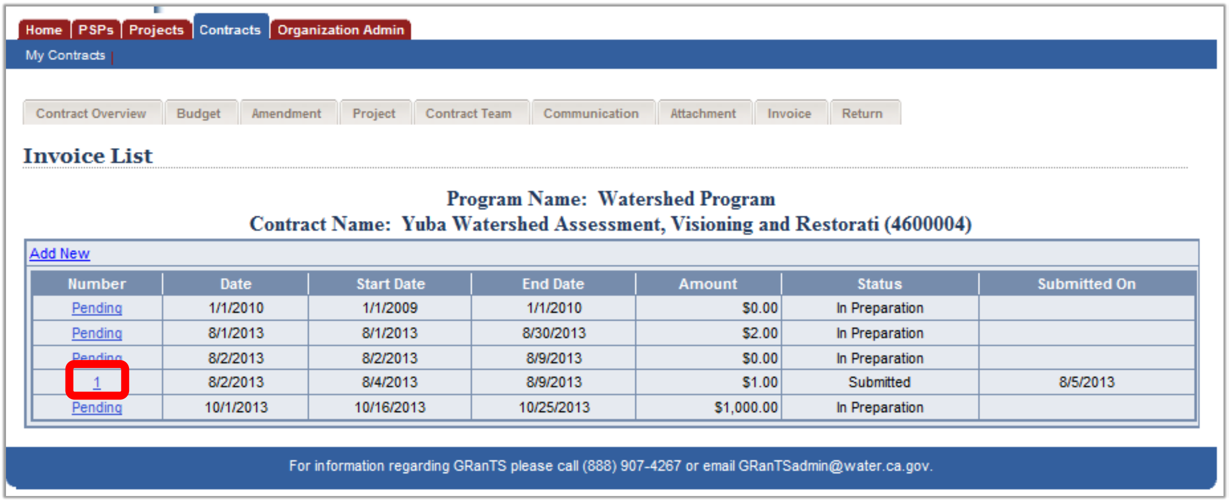
GRANTS is designed to save the invoice data for both the Grantee and DWR project managers to access.



Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	1/1/2010	1/1/2009	1/1/2010	$0.00	In Preparation	
Pending	8/1/2013	8/1/2013	8/30/2013	$2.00	In Preparation	
Pending	8/2/2013	8/2/2013	8/9/2013	$0.00	In Preparation	
1	8/2/2013	8/4/2013	8/9/2013	$1.00	Submitted	8/5/2013
Pending	10/1/2013	10/16/2013	10/25/2013	$1,000.00	In Preparation	

The invoice numbers, dates, period of work being billed, amount billed, status, and date submitted are listed in a column format.

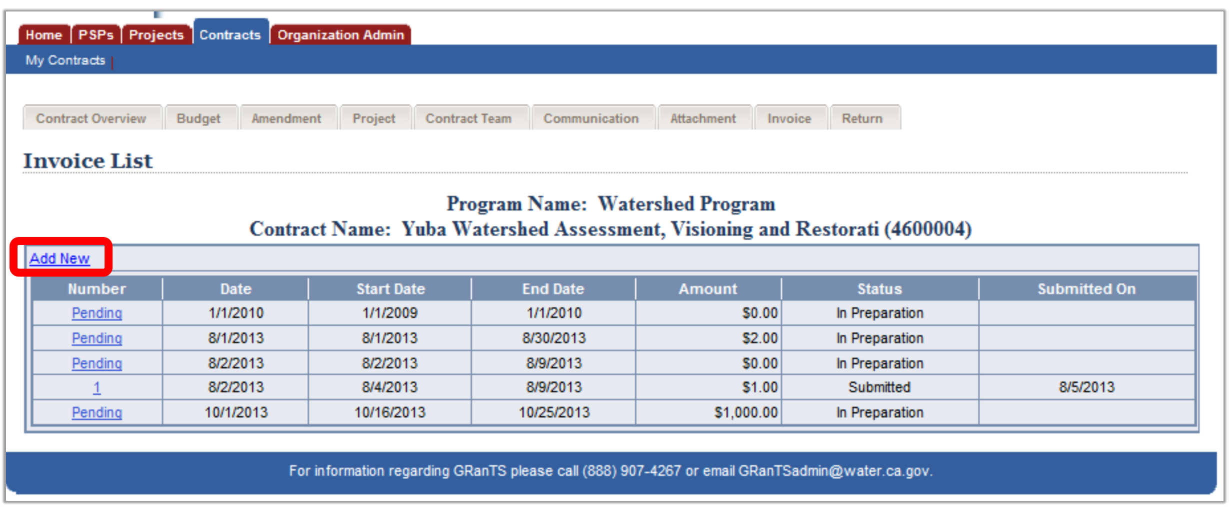
To see the details of an Invoice in this list, click on the **Invoice Number** hyperlink.



Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	1/1/2010	1/1/2009	1/1/2010	$0.00	In Preparation	
Pending	8/1/2013	8/1/2013	8/30/2013	$2.00	In Preparation	
Pending	8/2/2013	8/2/2013	8/9/2013	$0.00	In Preparation	
1	8/2/2013	8/4/2013	8/9/2013	$1.00	Submitted	8/5/2013
Pending	10/1/2013	10/16/2013	10/25/2013	$1,000.00	In Preparation	

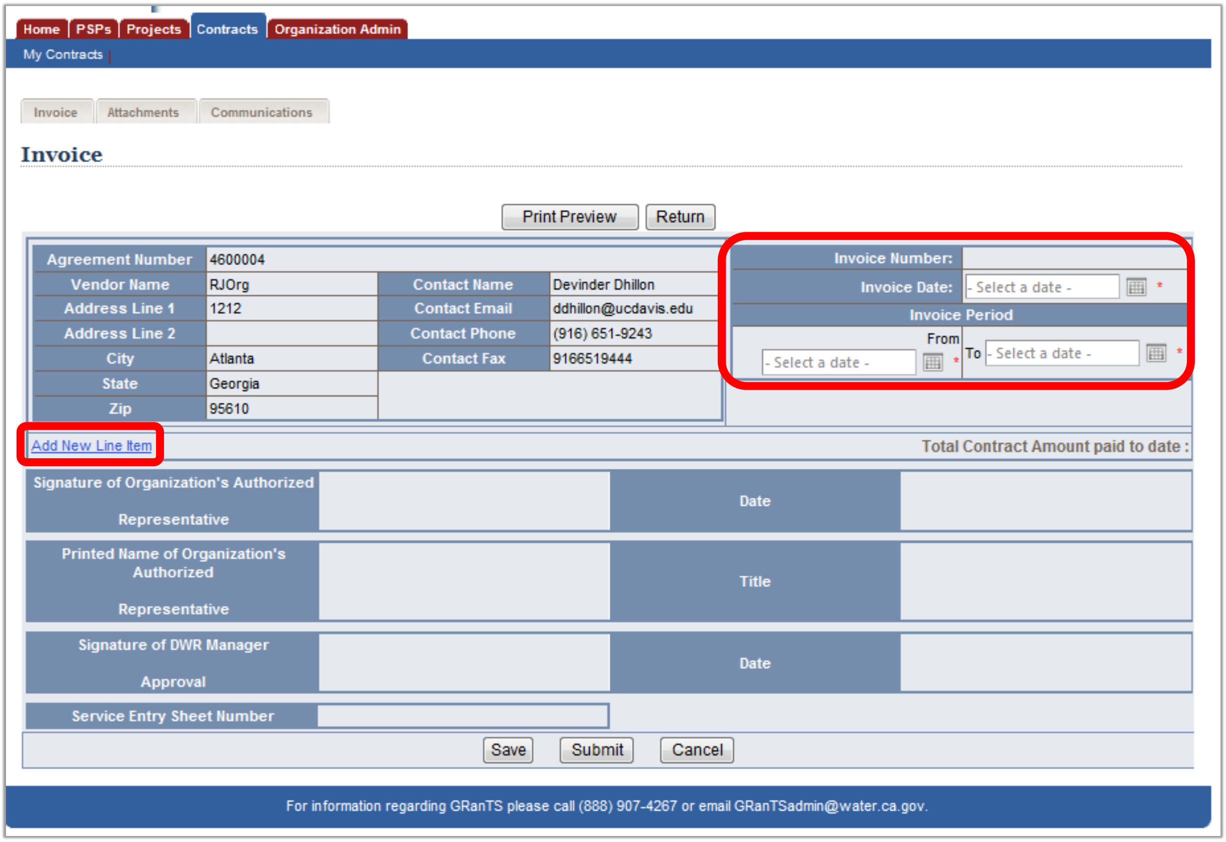
A. Preparing an Invoice for a Contract

To add a new Invoice, click on the **Add New** hyperlink displayed above the Invoice List on the **Invoices** workbook tab.

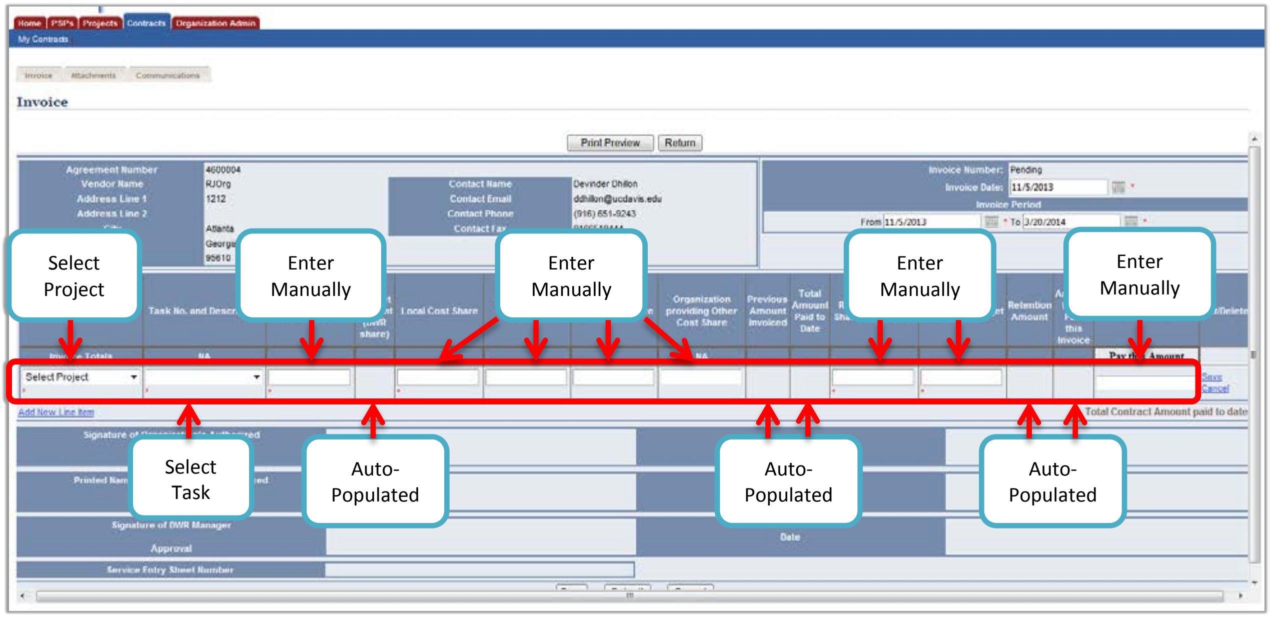


Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	1/1/2010	1/1/2009	1/1/2010	$0.00	In Preparation	
Pending	8/1/2013	8/1/2013	8/30/2013	$2.00	In Preparation	
Pending	8/2/2013	8/2/2013	8/9/2013	$0.00	In Preparation	
1	8/2/2013	8/4/2013	8/9/2013	$1.00	Submitted	8/5/2013
Pending	10/1/2013	10/16/2013	10/25/2013	$1,000.00	In Preparation	

Complete the **Invoice Date** and **Period** information. Click on the **Add New Line Item** hyperlink to begin entering Invoice data.



The following image shows the fields that auto-populate and those that are calculated manually. Most Programs encourage grantees/contractors to track expenditures by task in a spreadsheet tool. The information provided by this screen is easily transferred into spreadsheet form while the calculations are kept separate.



Select a Project from the **Project Name** dropdown list of Projects associated with the Contract.

The **Task No. and Description** dropdown menu will be populated with Tasks associated with the Project.

Select a **Task** from the **Task No. and Description** dropdown menu. Specify values for the following fields:

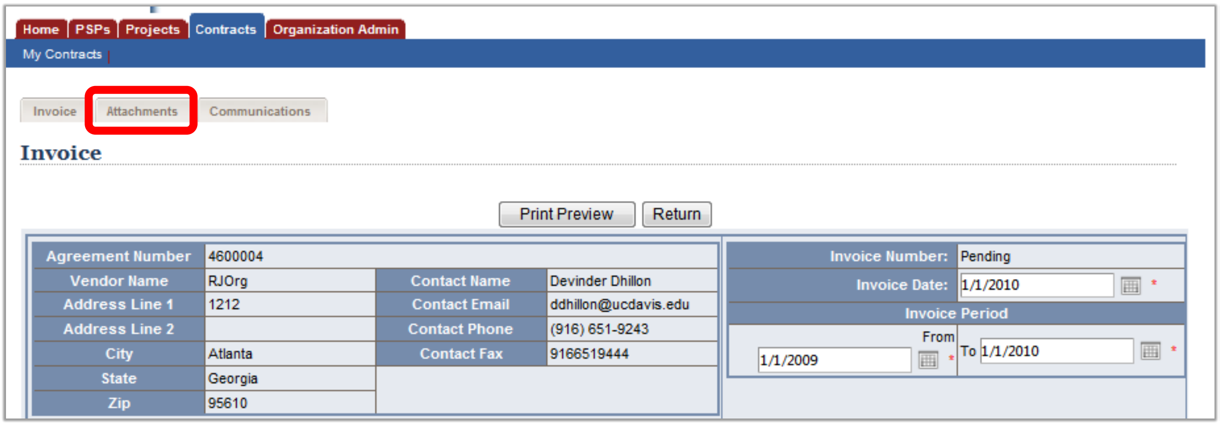
- Current Invoice Amount
- Local Cost Share
- Federal Cost Share
- Other Cost Share
- Org providing Other Cost Share
- Remaining Cost Share to be Spend
- Remaining Budget
- Comments

Click on the **Save** button displayed at the bottom of the **Invoice Line Item** page. Click on the **Return** button displayed at the top of the **Invoice Line Item** page.

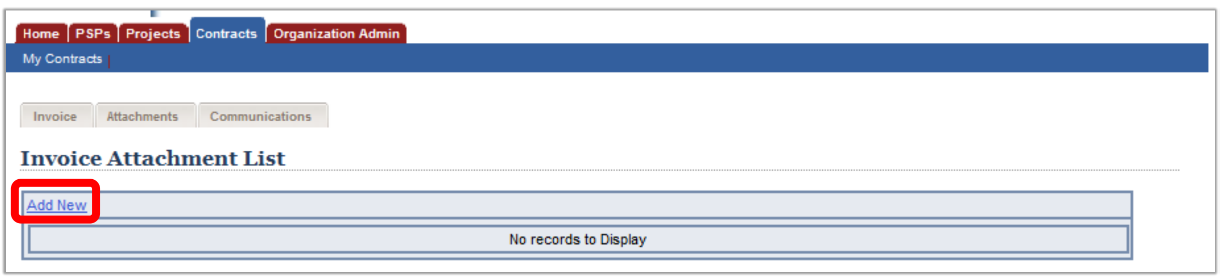
Repeat the steps above, as necessary, to complete the invoice.
Rows can be edited or deleted.

B. Invoice Attachments

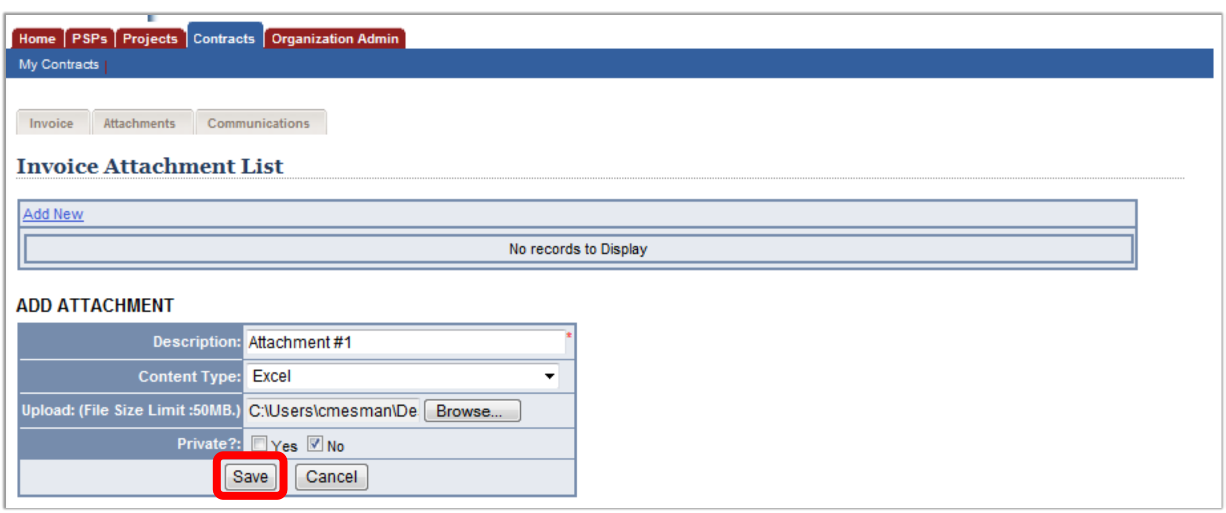
The attachment feature in the invoice module enables you to upload supporting documentation for invoices into GRANTS. Click on the **Attachments** tab in the **Invoice Workbook** for a particular Invoice to begin.



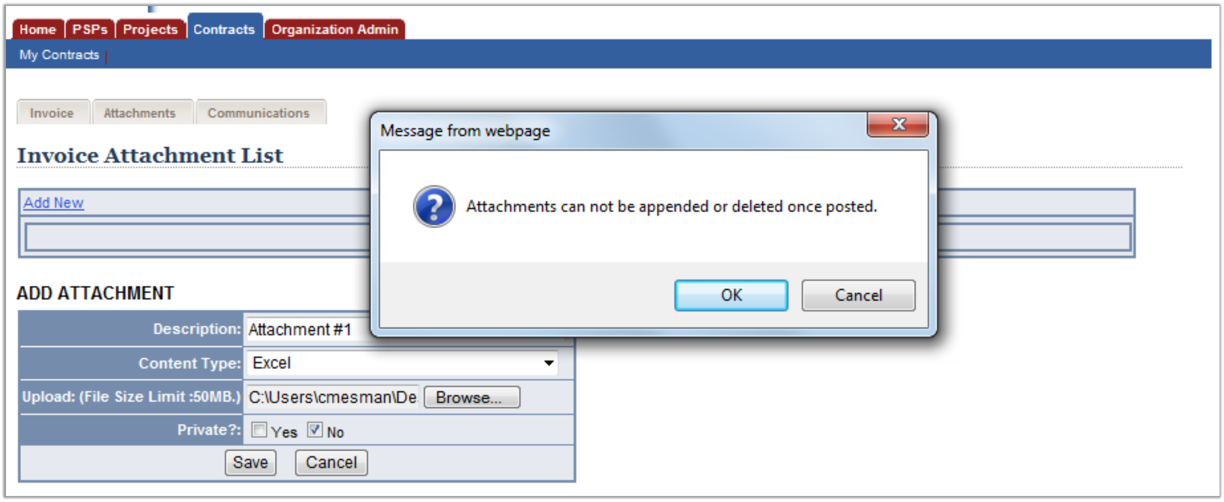
Click on the **Add New** hyperlink displayed above the Invoice Attachment List on the **Attachments** tab in the **Invoice Workbook**.



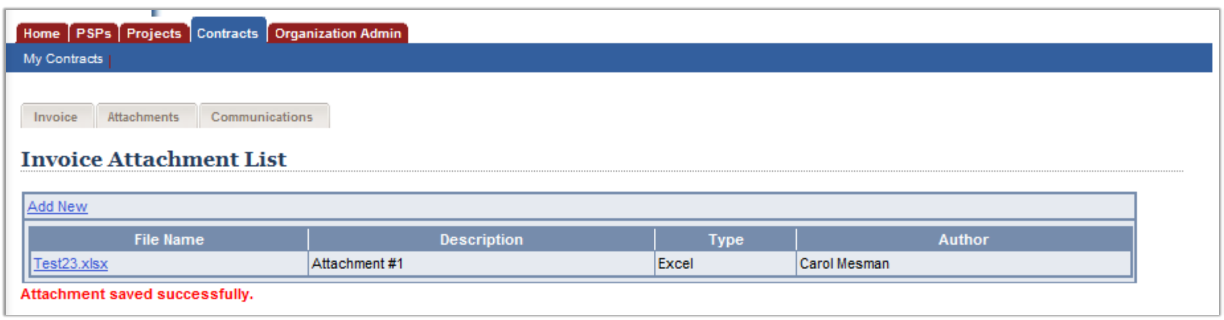
Be sure to provide a description, select the file type (aka. **Content Type**) by using the dropdown menu and indicate by checking if you want this attachment shared with others on the project team by clicking the private box: **Yes** or **No**. Click on the **Save** button once you're done.



The **Private?** checkbox: If you check **Yes**, only DWR staff will be able to view this attachment. Checking **No** allows everyone on the contract team to see the attachments. Once saved, attachments cannot be deleted or edited.

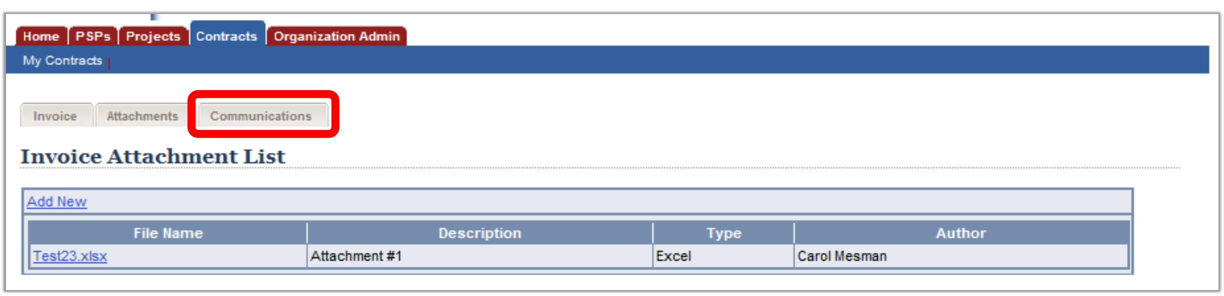


Click on the **OK** button, and you will be brought back to the Invoice Attachment List page where an **Attachment saved successfully** verification will appear indicating that the attachment, including its details was saved successfully.



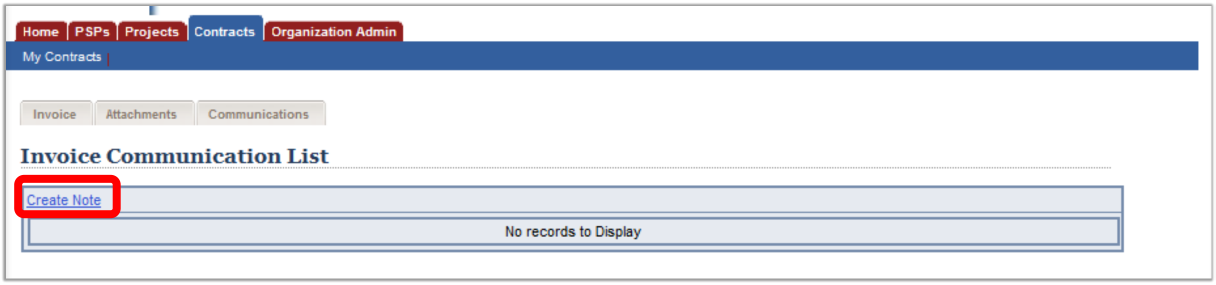
C. Invoice Communications

Click on the **Communications** tab in the **Invoice** workbook for a particular Invoice.

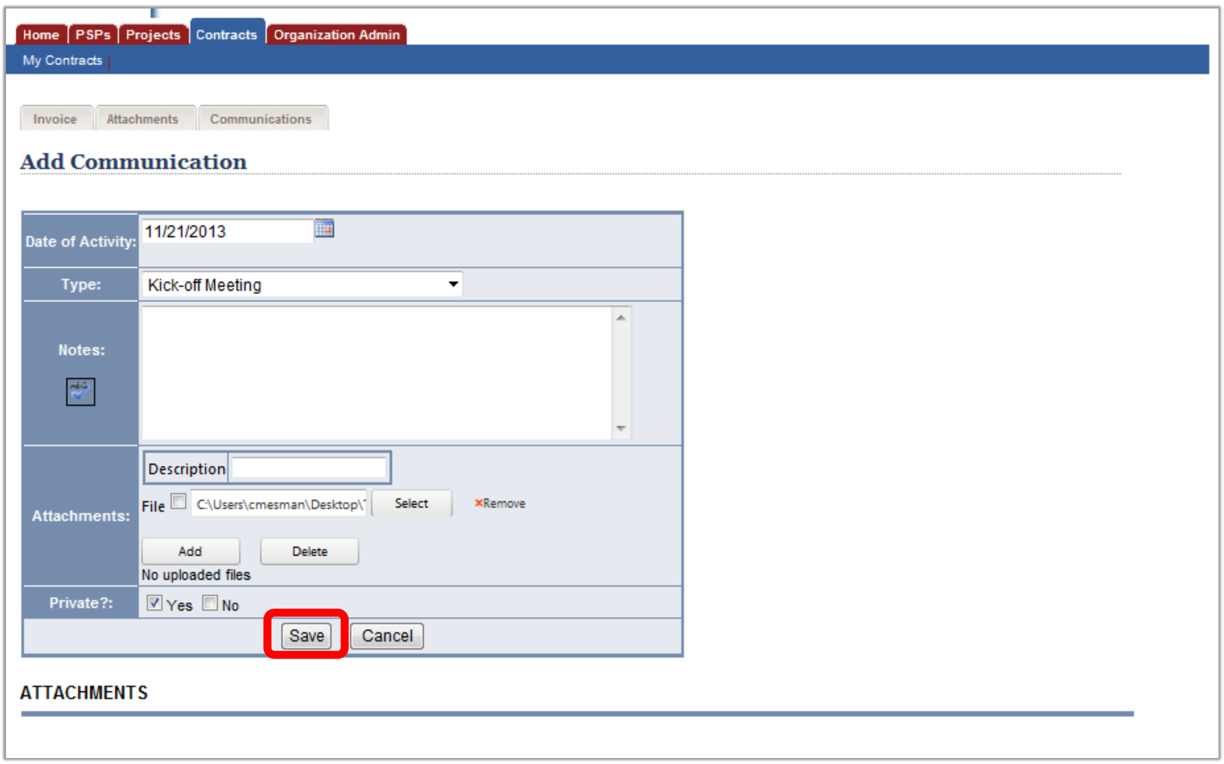


Click on the **Create Note** hyperlink below **Invoice Communication List**

.



A note is used to specify the details of Communication entries created on the **Add Communication** interface. It is also possible to upload Attachment(s) for the Communication entry. Click on the **Save** button when you have entered the necessary information.



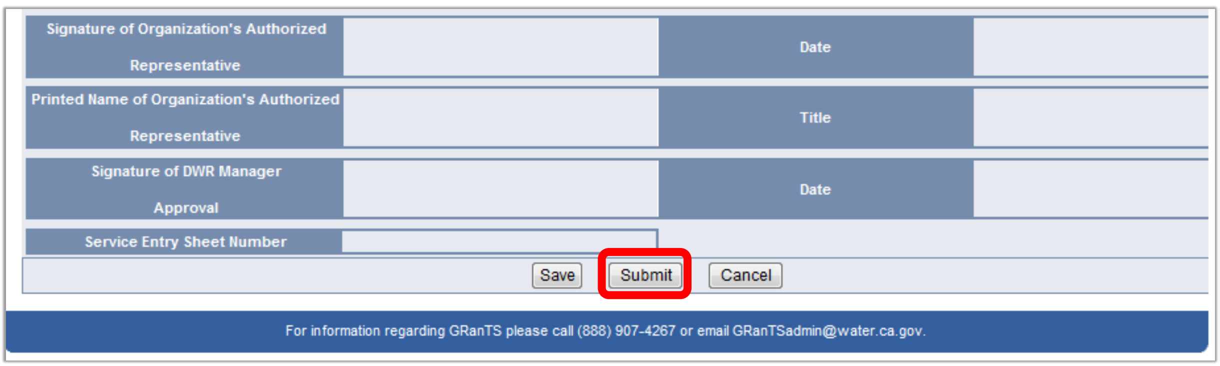
Regarding the **Private?** check box: If you check **Yes**, only DWR staff will be able to view this communication. Checking **No** allows everyone on the contract team to see the note and attachments.

You can see existing communications and their corresponding attachments by clicking the hyperlinked date in the **Invoice Communications List**.

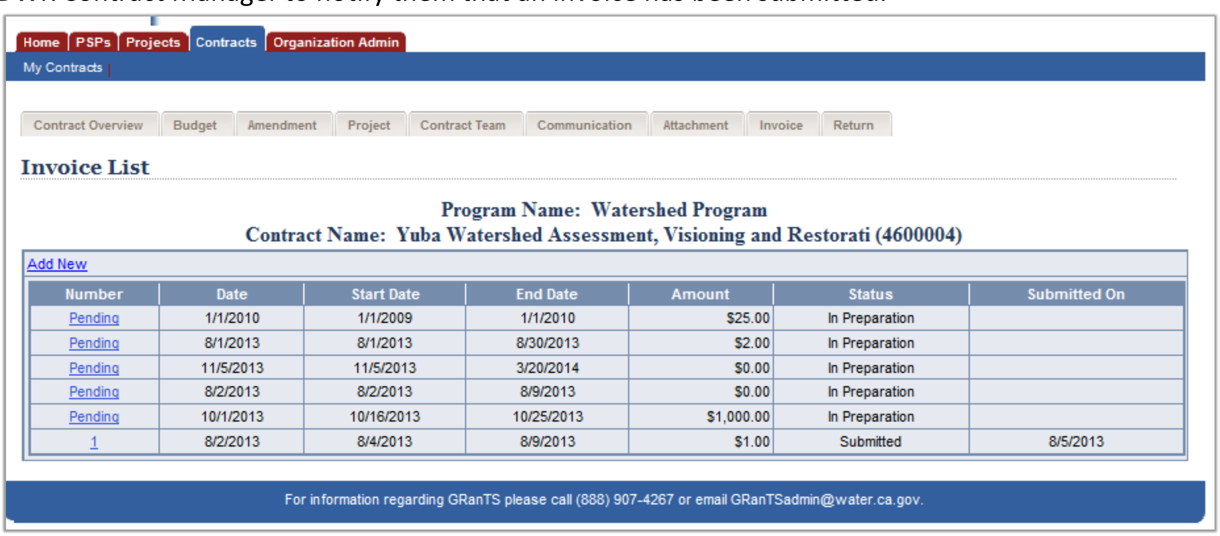
Date	Type	Comments	Attachments	Private	Author
11/21/2013	Kick-off Meeting		Included	Yes	Carol Mesman

D. Submitting an Invoice

Once finalized, the invoice can be printed, signed, and sent with the documentation required by the funding program. Click on the **Submit** button when the invoice is ready to be reviewed and processed by DWR.



Once your invoice has been submitted, the status will update on the invoice list. An email will be sent to the DWR Contract Manager to notify them that an invoice has been submitted.



Number	Date	Start Date	End Date	Amount	Status	Submitted On
Pending	1/1/2010	1/1/2009	1/1/2010	$25.00	In Preparation	
Pending	8/1/2013	8/1/2013	8/30/2013	$2.00	In Preparation	
Pending	11/5/2013	11/5/2013	3/20/2014	$0.00	In Preparation	
Pending	8/2/2013	8/2/2013	8/9/2013	$0.00	In Preparation	
Pending	10/1/2013	10/16/2013	10/25/2013	$1,000.00	In Preparation	
1	8/2/2013	8/4/2013	8/9/2013	$1.00	Submitted	8/5/2013